eSTART

Course Guide for

Agency and Leave Administrators

August 2016

General Information About This Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the assumption that every employee earns leave and has leave to use. These estimates and projections may not always be accurate, as the State payroll system is the system of record for accrual balances. However, the eSTART balances are updated twice monthly with the State payroll system balances to ensure the closest possible accuracy.

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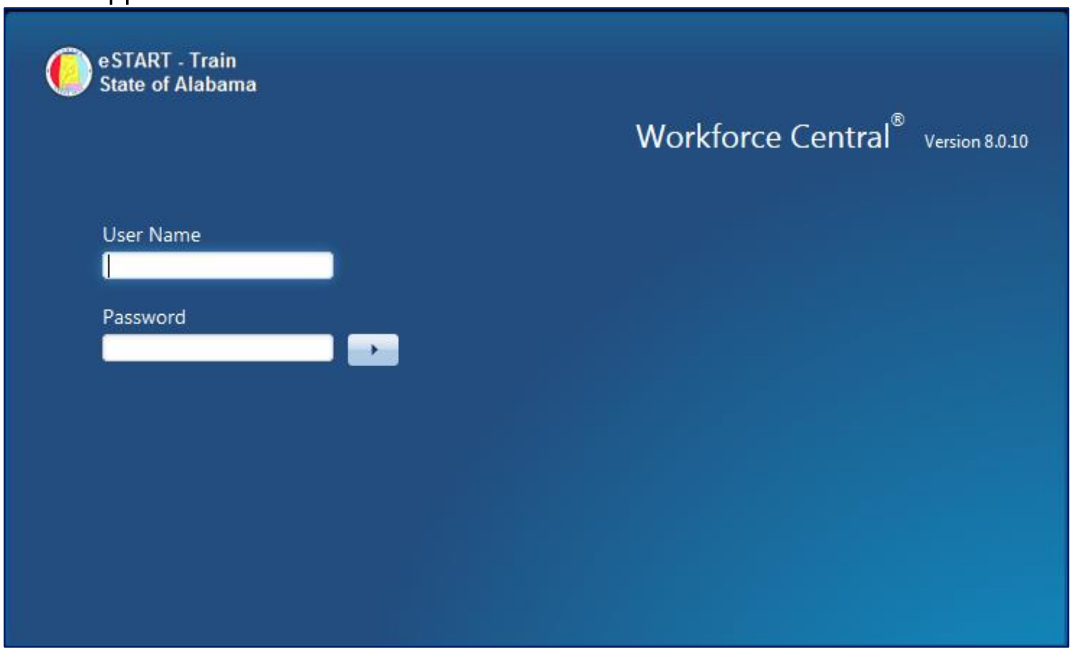
Log On and Workspaces

Purpose

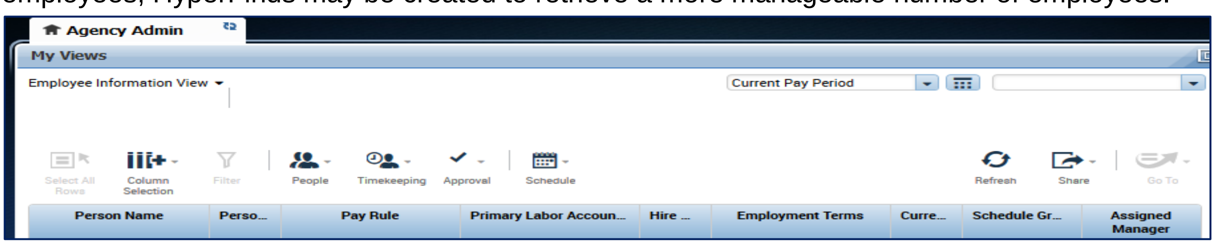
The eSTART log on page provides access to all the features of the eSTART application where you perform your administrator tasks.

Log on to the application.

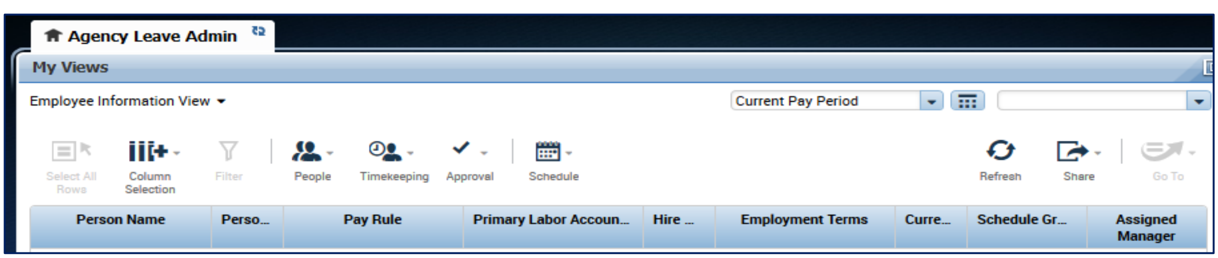


Workspaces

The default workspace for an agency administrator or timekeeper will be the Agency Admin workspace. This view will display up to 5,000 employees. If your agency has more than 5,000 employees, HyperFinds may be created to retrieve a more manageable number of employees.



An agency administrator or timekeeper may also be a Leave Administrator. The default workspace for a dual role administrator will be the Agency Leave Admin workspace, which allows access to the Leave widgets. Although a Leave Workspace is provided on the Workspaces carousel, the Leave functions are also available on the Agency/Leave Admin workspace for anyone who has a dual role.



Create HyperFind Query by Manager

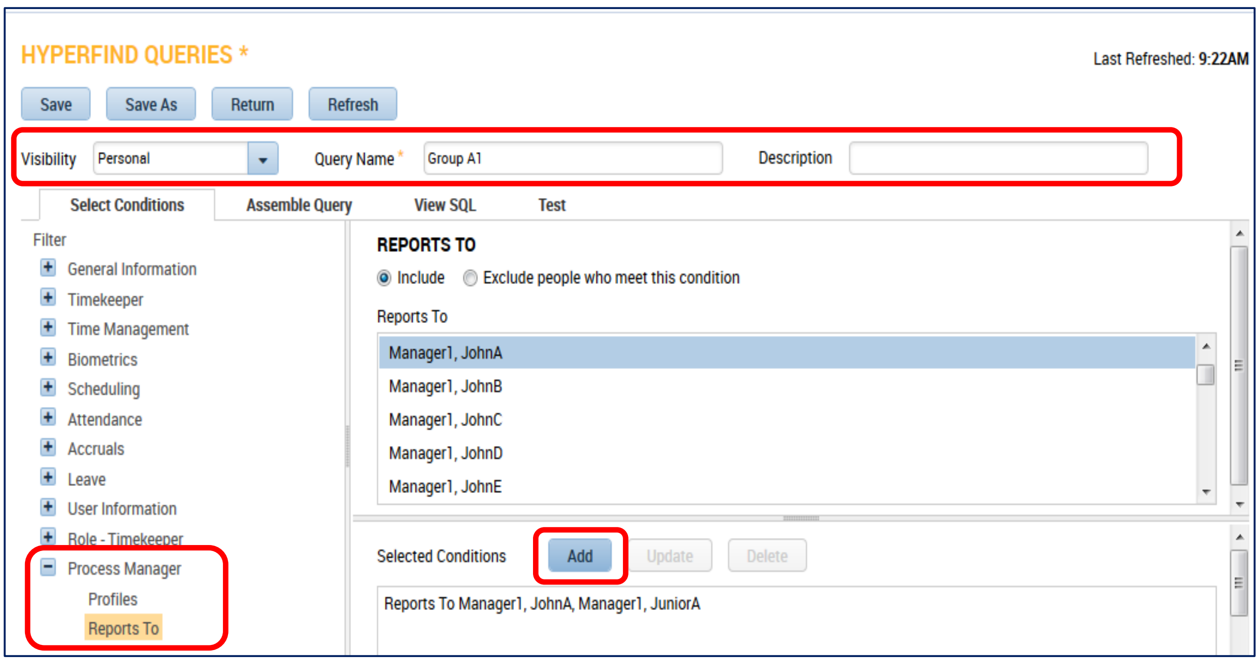
HyperFind Queries are used to filter and retrieve lists of employees who meet a specific set of criteria, for example, all employees in a specific agency or division. In this example, we will create a query to retrieve all employees who report to John Manager and Junior Manager.

Creating a New HyperFind Query

1. From the **Related Items** pane, select **Setup**, then select **HyperFind Queries**.
2. Select the **New** button. The HyperFind screen displays.
3. Select **Personal** from the **Visibility** drop-down.

   NOTE: Ad Hoc creates a temporary query. **Personal** creates a permanent query, visible only to the person creating it. This type of query may be shared with others but must be assigned. See steps in **Assigning a Personal HyperFind Query to Another Person** section below.

4. Enter the name of the new query in the **Query Name** field. The **Description** field is optional.

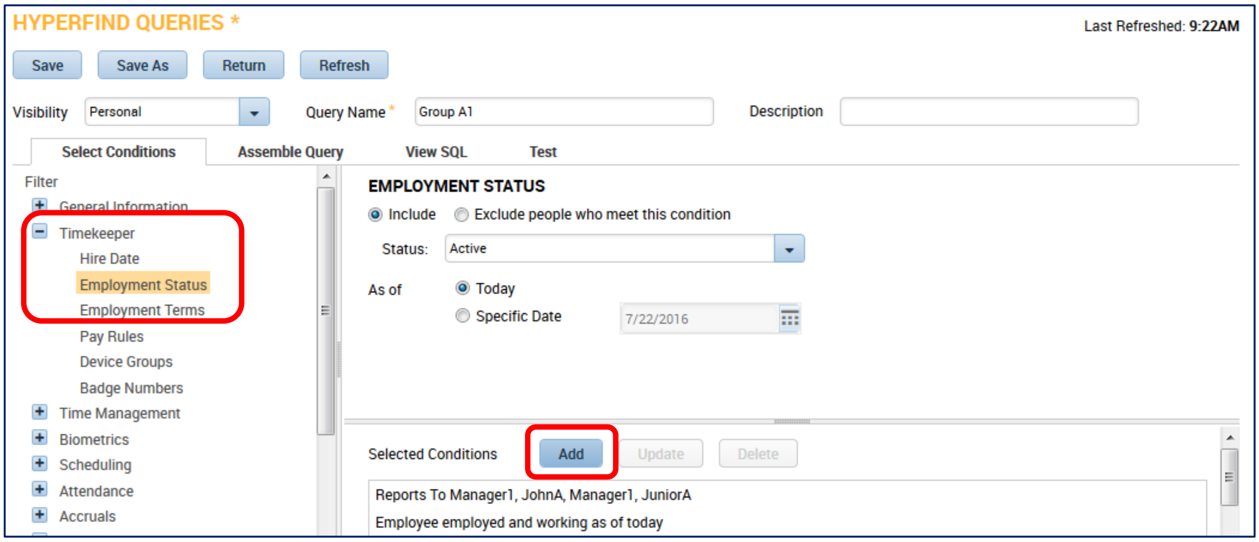


5. From the **Filters** menu, expand the **Process Manager** category. Select **Reports To.**
6. Select **John Manager** and **Junior Manager** from the list.

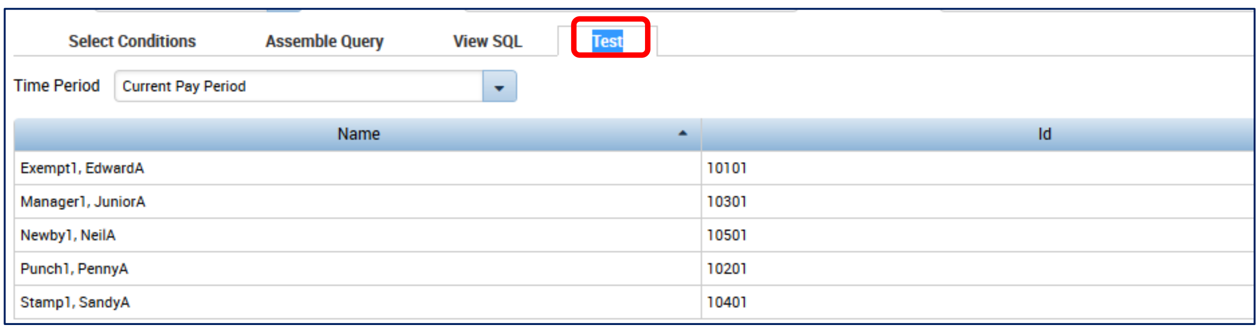
NOTE: Hold down the **CTRL** key to select more than one manager.

7. Select the **Add** button. The condition displays in the **Selected Conditions** window.
8. From the **Filters** menu, expand the **Timekeepers** category. Select **Employment Status**.

9. To have the query retrieve only employees who are active as of today, no changes are needed to the criteria. Select **Add.**

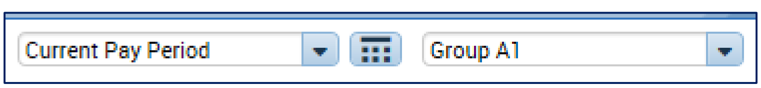


10. To test the query, select the **Test** tab. A listing of employees should display.



11. If the employee list is correct, select **Save**.

12. The new HyperFind Query may now be used to filter the employee listing.



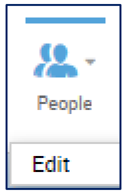
NOTE: If a public HyperFind query is needed, contact your eSTART Administrator.

New Employee Updates

When a new employee record is added in the State's payroll system, a shell record is loaded to eSTART by a nightly interface. However, certain information will need to be manually updated by the Agency Administrator in eSTART.

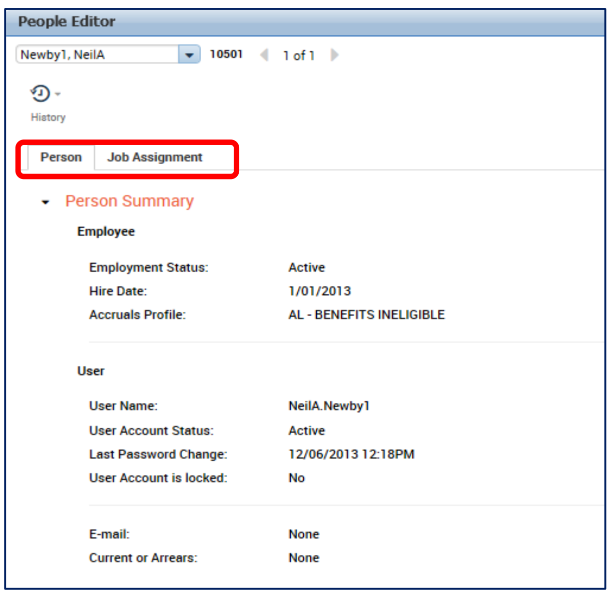
Locate employee records

- From any **My Views** widget or from **Related Items>Quickfind,** select the employee name(s). Then select **People>Edit**.



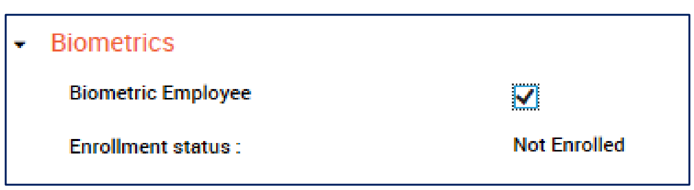
- The **People Editor** page displays, as below.

NOTE: There are two tabs on this page: **Person** and **Job Assignment**. The left menu for each tab may vary based on the access level of employee.



Edit employee records

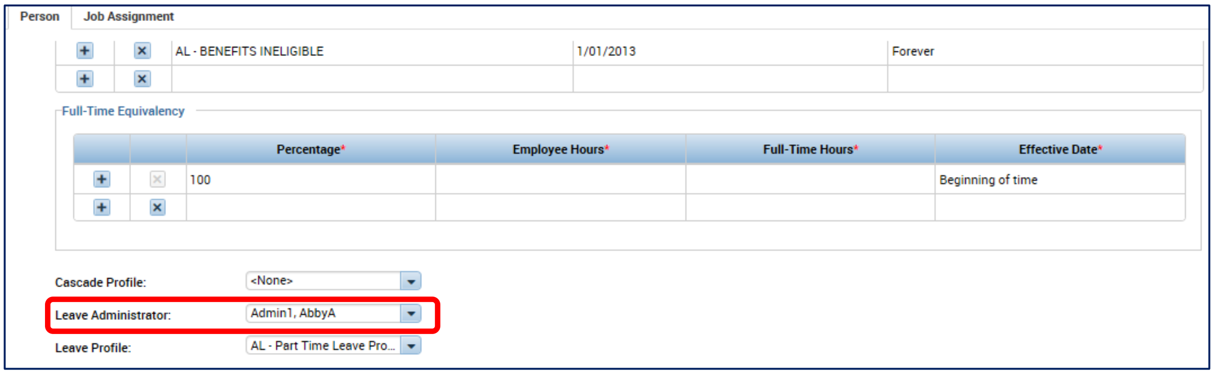
1. If the employee will use a time clock to record time, select the **Biometrics** link from the **Person** tab on the screen above. Then select the **Biometric Employee** check box. If employee will not use time clock, skip to the next step.



2. Select **Accruals & Leave** link.

   Each employee must be assigned a Leave Administrator. This allows the Leave Administrator to receive notification when the employee submits an extended leave case.

   a. To assign a Leave Administrator to the employee, open the **Leave Administrator** drop-down and select the Leave Administrator's name from the drop-down.



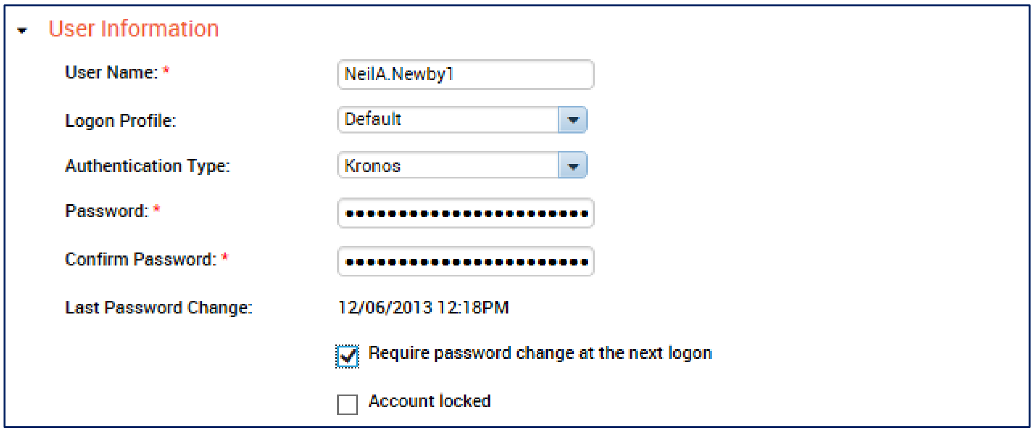
3. Select the **User Information** link.

   a. If the user has an Active Directory ID (usually an email address), change the User Name to the employee's email address, i.e. jane.doe@agency.alabama.gov.

   b. Select **LDAP** from the **Authentication Type** drop-down. The user's password will be their network password.

c. However, if the employee does not have an Active Directory ID, the assigned Logon ID and initial password will be populated in the **User Name** field by an interface.

d. The initial password will be **P@ssw0rdxxx** (xxx = your agency number).



4. Next, select the **Contacts** link. If the employee has an Agency email account, the email address should be present in the **E-mail** field. If it is not present, it must be added.

5. Select **Additional Information**.
    a. In the right column of the table, key the information that applies to the employee for:
        i. **Current/Arrears – LEAVE FIELD BLANK – DO NOT KEY**
        ii. **OT/Comp** – If the employee is non-exempt and has been approved for overtime, key **OT** in this field. Else it will default to **Comp**. The field will be blank for Exempt employees who do not earn OT or Comp.
        iii. **Lunch Length** - (0, 30, 45, 60 or 90) – the length of the employee's lunch time.
        iv. **Schedule Type** - See the legend below for the values of this field.
        v. Key the **Approver ID** (employee ID) of the employee's manager.

NOTE: The **Manager Access Group** field is used for establishing a permanent Delegate Manager and is covered in a later section of the manual.

Also, the data in the **GHRS Info** field is obtained from the payroll system and is informational only. The data will vary based on the employee type or a portion of the field may be blank. If it is changed or deleted, it will repopulate overnight. Below is an explanation of each populated item.

PP (Pay Policy): SMARS; **LVP** (Leave Policy): ELBL; **PC** (Pay Class): SMREG; **FLSA** (FLSA Code): NORMAL: **ALG** (Annual Leave Grant).

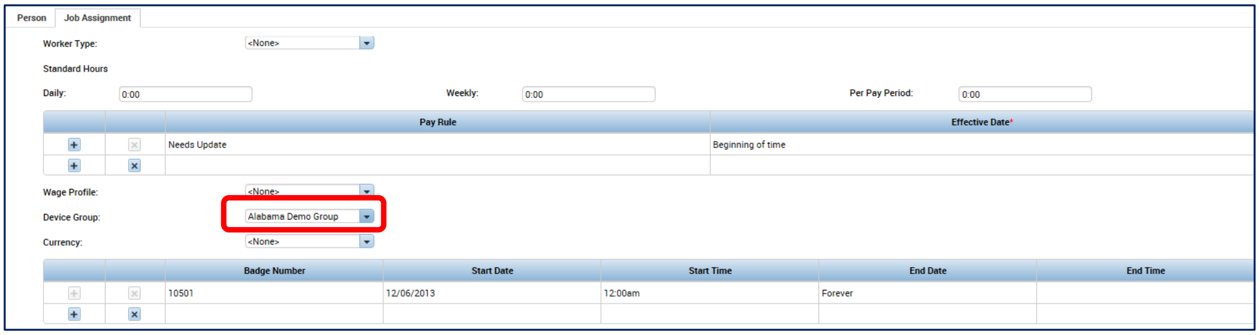
Attestation Profile – not applicable in most agencies.

Current or Arrears	
OT or Comp	
Lunch Length	8
Schedule Type	60
Approver ID	69545
Manager Access Group	
GHRS Info	
Attestation Profile	

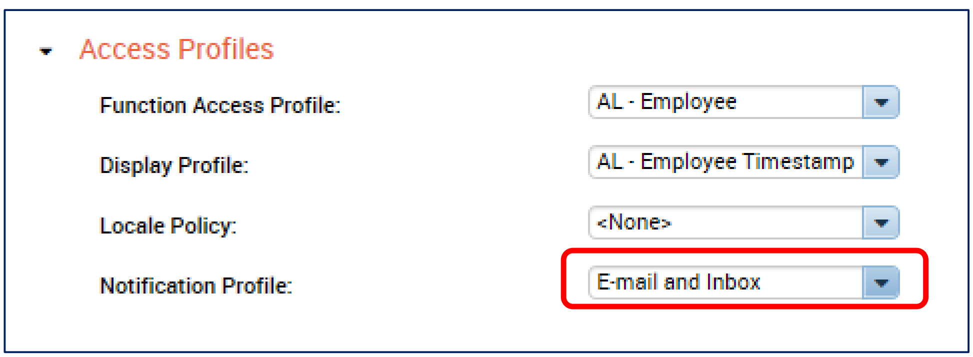
Schedule Type:

8 – 8 hour employee – Traditional schedule
8N – 8 hour employee - Non-Traditional schedule
8PI – 8 hour Exempt employee who punches IN ONLY
8PA – 8 hour Exempt employee who punches IN and OUT
10 – 10 hour employee
12 – 12 hour employee
24 – 24 hour employee

6. Select the **Job Assignment** tab.
7. If the employee will record time from a time clock, select the **Timekeeper** link**.**
    a. Select the time clock device from the **Device Group** drop-down.
    b. If the employee will not use a time clock, skip this step.



8. To allow email notification for the employee, select **Access Profiles** from the **Job Assignment** tab.
    a. If the employee uses an Agency mail account, choose **Email and Inbox** from the **Notification Profile** drop-down**.**
    b. If the employee does not have an Agency mail account, choose **Inbox Only**.

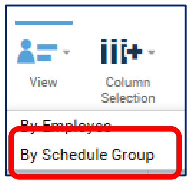


9. **Save** the changes.

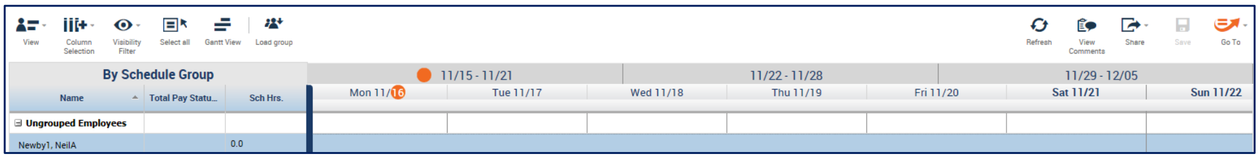
NOTE: The update will require an overnight cycle to become effective. Employees who will use a time clock may be enrolled on the clock the following day.

10. Link to **Schedule Editor** from the **Go To** menu or go to **Related Items>Schedule Editor** to add a work schedule for the employee. The **Schedule Editor** page displays.

11. Select **View>By Schedule Group**.



The **By Schedule Group** page displays.



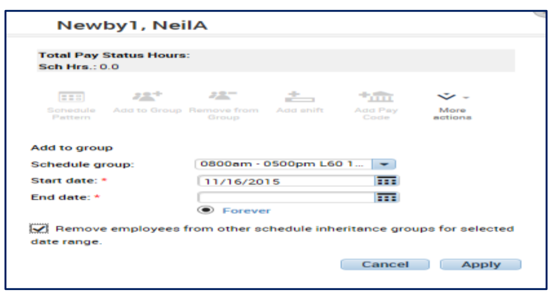
Groups allow multiple employees to be assigned the same work pattern. The pattern is assigned to the group and applied to all employees within the group.

If the employee will have a regular schedule, it is best to add them to an existing group. Contact your eSTART Administrator if a new group is needed.

12. Set the Time Period with the start date of the schedule.

13. Highlight the row with the employee name.

14. Right-click on the employee name and choose **Add to Group** from the menu. The window below displays.



15. Select the new **Schedule Group** assignment, **Start Date** and **End Date.** Select **Forever** if no specific End Date.

NOTE: Non-exempt employees must be assigned to a schedule group with a specific lunch time, such as **0700-0400pm L60 12-00**. "L60" refers to the length of the lunch time. There are also groups with 30-minute lunches, which will be denoted as "L30". The "12-00" refers to the start time of the lunch. There are existing groups with varying lunch start times in the list, such as 11:15 or 12:30.

The groups ending with **Auto-PFS** are to be used for **FLSA exempt employees <u>only</u>**.

16. Select the check box to **Remove employees from other schedule inheritance groups for selected date range**. Click **Apply**. Then **Save** the page.

Updates to Existing Employee Records

IMPORTANT: Employee and Manager timecard approval, as well as Agency sign-off should occur as soon as possible after the employee transfers or leaves the agency.

Transfers between Agencies

Transfer In

- Employees transferring into an agency will not be viewable via eSTART until all the documentation has been processed through State Personnel and their information has been updated in the payroll system.
- Set up the transferred employee in their new agency using the **Edit employee records** section above.

Transfer Out or Separations of Service

- The **employee and manager should approve the final timecard** as soon as the employee completes his last hours with the agency. The **Agency Administrator must sign-off** on the timecard **no later than the next business day**.

NOTE: Failure to immediately sign-off may result in the last timesheet and leave event not being processed accurately. These must be manually corrected in the payroll system.

- Once an employee's timecard is signed off, the employee's Approver ID must be removed from the **People Editor,** select the **Additional Information** link after the last pay period has been signed off. If this is not done, the employee will continue to display in the employee listings for the current manager.
- The record may now be updated in the payroll system to reflect the transfer.

IMPORTANT! DO NOT update an employee's timecard for any pay period following their last day at the agency. This will be the responsibility of the current agency.

Also, if an employee's separation is updated in the payroll system **before** the timecard is signed off, the **Terminated Employees** HyperFind query must be used to locate the employee.

NOTE
An individual timecard may be signed off before the end of the pay period, if necessary.

Changing an Exempt Employee to Punch

Punch In

If the Agency decides to have exempt employees punch, the following changes must be made to the People Editor.

The **Punch In** feature is used to allow employees to punch in at the start of their shift only. They will not be required to punch in or out any other time of day. When the decision is made for an exempt employee to punch in, the following change must be made in the People Editor.

1. From the **People Editor**, select **Additional Information** from the **Person** tab.
2. Click the row for the **Schedule Type**.
3. Type **8PI** in the right column of this field.
4. **Save** the page.

Additional Information

Additional Information	
Current or Arrears	Arrears
OT or Comp	Comp
Lunch Length	60
Schedule Type	8PI
Approver ID	69545
Manager Access Group	
GHRS Info	
Attestation Profile	

Schedule Type:

8 – 8 hour employee – Traditional schedule

8N – 8 hour employee - Non-Traditional schedule

8PI – 8 hour Exempt employee who punches IN ONLY

8PA – 8 hour Exempt employee who punches IN and OUT

10 – 10 hour employee

12 – 12 hour employee

24 – 24 hour employee

NOTE: The update will require an overnight cycle to become effective.

The schedule must then be changed to reflect an **auto deduct (auto PFS) lunch**. From **Schedule Editor** assign the employee to a schedule similar to this one:

0800am – 0500pm L60 Auto PFS

Punch All

For exempt employees who will punch in and out at the beginning and end of their shifts, as well as in and out for lunch, their **Schedule Type** setting will be **8PA**.

When the decision is made for an exempt employee to punch all their time, the following change must be made in the People Editor.

1. From the **People Editor**, select **Additional Information** from the **Person** tab.
2. Click the row for the **Schedule Type**.
3. Type **8PA** in the right column of this field.
4. **Save** the page.

Additional Information

Additional Information	
Current or Arrears	Arrears
OT or Comp	Comp
Lunch Length	60
Schedule Type	8PA
Approver ID	69545
Manager Access Group	
GHRS Info	
Attestation Profile	

Schedule Type:

8 – 8 hour employee – Traditional schedule
8N – 8 hour employee - Non-Traditional schedule
8PI – 8 hour Exempt employee who punches IN ONLY
8PA – 8 hour Exempt employee who punches IN and OUT
10 – 10 hour employee
12 – 12 hour employee
24 – 24 hour employee

NOTE: The update will require an overnight cycle to become effective.

Employees who will punch all their time (8PA) **must** have a work schedule with a **non-auto deduct (auto PFS) lunch**. Since the employee will be punching in and out for lunch, their lunch would no longer be automatically deducted. The employee would need to be assigned to a schedule with a lunch time similar to this one:

0800 – 0500pm L60 12:00

Changing from Non-Exempt Employee to Exempt

When an employee's pay rule is changed from non-exempt to exempt, the change must be updated and approved in THE PAYROLL SYSTEM. Once this is done, the interface will update the employee's information in the People Editor.

- If the exempt employee will not punch his time:
  - The schedule **must** then be changed to reflect an **auto deduct (auto PFS) lunch**. The employee would need to be assigned to a schedule similar to this one: **0800 – 0500pm L60 Auto PFS**.

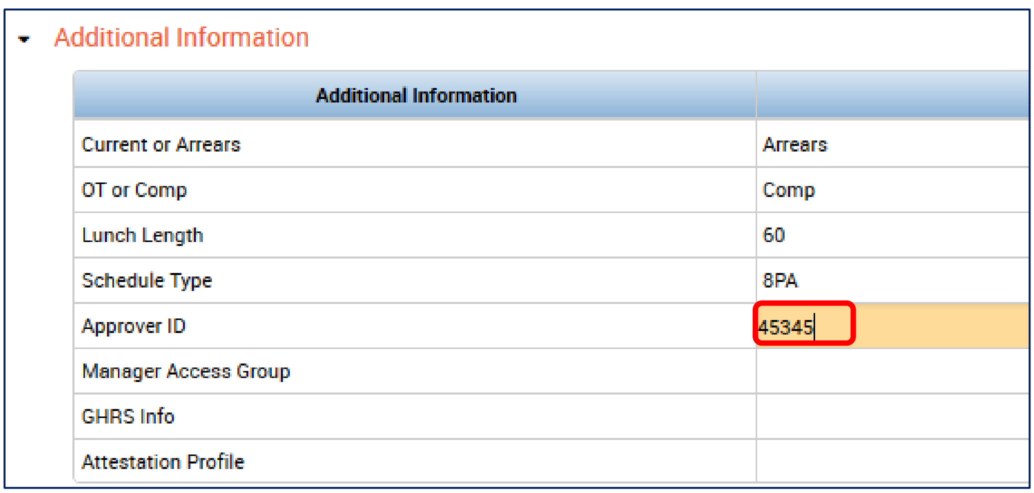
If the agency decides to have the exempt employee punch their time, see the previous section.

Promotion to Manager or Change to Manager's Direct Reports

When a person is promoted to manager, or when the manager's direct reports change, the manager's **employee ID** must be keyed on the **People Editor** for *each* employee. If the ID is not changed, the employee will continue to display in the employee listings for the current manager.

NOTE: Both managers will continue to see the employee in their listings for the pay period in which the ID was changed.

1. From the **People Editor**, from the **Person** tab, select **Additional Information**.
2. Key the **Approver ID** (employee ID) of the employee's new manager.



NOTE: The update will require an overnight cycle to become effective.

My Views

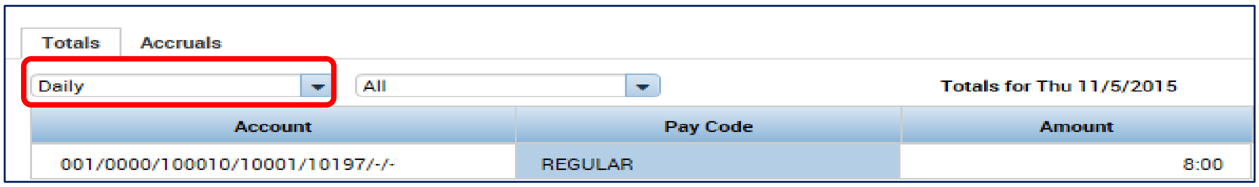
Widgets from the **My Views** listing are "customized online reports" that are useful for viewing timecard and employee information. This information has been separated into different views to allow specific information to be retrieved. The columns may also be sorted in order to filter certain information to the top or bottom of the list. The **Reconcile Timecard View** is the default for the list.

- **Employee Information View** – provides information pertaining to the employee's Name, ID, Pay Rule, Labor Account, Hire Date, Employment Terms, Current/Arrears, Schedule Group and Assigned Manager. It is information from the People Editor that is most commonly needed.
- **Employee Hours View** – provides Name, ID and Pay Rule, contains their Regular and Non-Worked Hours totals, as well as OT and Comp time totals for the Time Period selected.
- **Employee Holiday Credit View** – provides basic Name, ID and Pay Rule information, as well as Holiday Taken and Holiday Earned totals. The Holiday Taken column is for non-exempt employees. The Holiday Taken-Exempt column contains the totals for exempt employees.
- **Custom Field Reporting View** – retrieves information from the Person>Additional Information section of the People Editor. It contains Name, ID, Pay Rule, Schedule Group, Lunch Type, Employee Type, Approver ID, Current/Arrears and OT/Comp.
- **Bereavement Leave View** – will provide Name, ID and Pay Rule, as well as the employee's total amount of sick time in the Sick Hours column and any Bereavement Owed hours.
- **QuickFind** – useful when searching for an individual employee. The search can be conducted by using either a portion of the last name, followed by an asterisk (*), or by keying the Employee ID.
- **Leave Cases View** – used to review case information pertaining to employees on extended leave.
- **Leave Hours View** – used to review leave hours pertaining to employees on extended leave.
- There are several other useful widgets in the **My Views** drop-down. Some are used to view information on accruals, verify the biometric status and **Reconcile Timecard View**. The **Pay Period Close View** widget is used at the end of the pay period during agency sign-off and is referenced in a separate section of this guide.

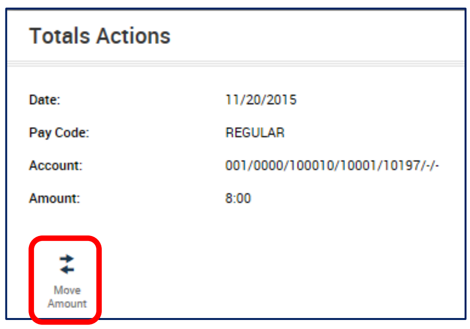
Move Amounts

Part-time, semi-monthly workers have a pre-determined number of regular work hours for each payroll cycle. On occasion they may work additional hours or have extra hours due to the number of work hours in the pay period. These additional hours must be moved to a different pay code to post correctly in the payroll system.

1. From the employee timecard, select the correct pay period.
2. Highlight the date row in the timecard for the hours you want to move.
3. From the **Totals** tab, select **Daily** from the drop-down menu.

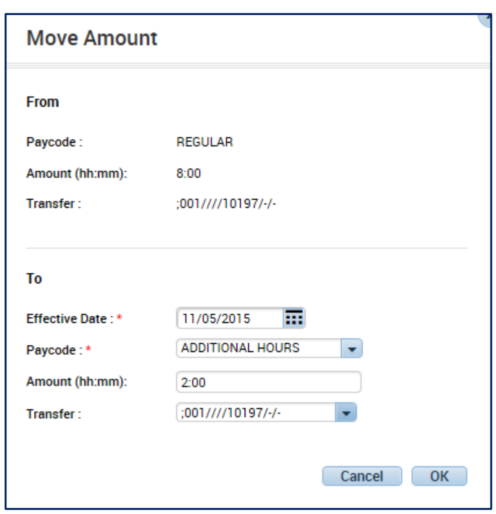


4. Right-click on the Pay Code to be moved, **Regular** in the example above. The window below displays.



5. Choose **Move Amount.** The **Move Amount** window displays.

   Enter the number of hours in the **Amount** field. These are the additional hours over the generated hours in the payroll system for the pay period.

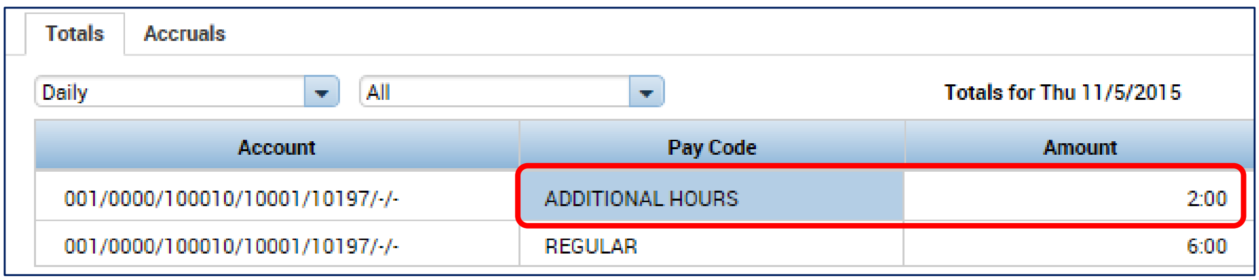


6. Verify the **Effective Date** and **Transfer** field.
7. Select **OK**.
8. Select **Save**.

9. Select **Refresh.**

10. To verify, highlight the **Date** row again in the timecard.
11. From the **Totals** tab, select **Daily** from the drop-down menu.

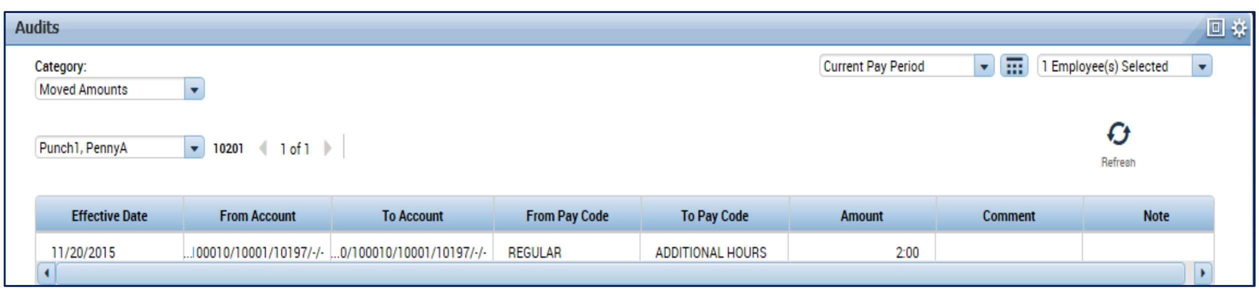
The **Additional Hours** pay code and time should display correctly in the pane.



Account	Pay Code	Amount
001/0000/100010/10001/10197/-/-	ADDITIONAL HOURS	2:00
001/0000/100010/10001/10197/-/-	REGULAR	6:00

The moved amount transaction will also display in the Audits log.

- To view, select **Go To>Audits.**
- Select **Moved Amounts** from the **Category** drop-down.



Effective Date	From Account	To Account	From Pay Code	To Pay Code	Amount	Comment	Note
11/20/2015	...l00010/10001/10197/-/-	...0/100010/10001/10197/-/-	REGULAR	ADDITIONAL HOURS	2:00		

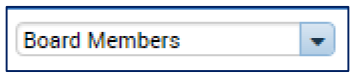
NOTE: For part-time, semi-monthly employees who work fewer than their specified hours for the pay period, the non-worked hours should be added to the timecard using the pay code for **Leave Without Pay** to prevent overpayment.

Board Meeting Pay Code

A **Board Meeting** pay code is available to allow an agency to enter the amount of pay for its board members.

The board members will display in your employee listings when using **All Home and Transferred In** from the Show drop-down. Sort by clicking on the **Pay Rule** column header to sort the board members to the top of the listing. Then select them and choose **Go To>Timecards.** Also, there is a separate HyperFind in the Show drop-down for **Board Members** that may be used if desired**.**

1. From the Show drop-down, select **Board Members**.



2. Choose the **Board Meeting** pay code from the drop-down list on the date the meeting was held.
3. In the **Amount** column, key the **AMOUNT OF PAY.** A decimal should be entered in the field to reflect a dollar amount. For instance, $50.00 should be keyed as 50.00 in the Amount column.

Wed 11/18		
Thu 11/19	BOARD MEETING	$50.00
Fri 11/20		

4. Select **Save.**

NOTE: If the pay code is keyed into eSTART, it should not be keyed into the payroll system, unless the board member is in a subset that is in PILOT mode.

Also, if the pay code is added to the timecard of someone who is not a board member, it will be rejected in the payroll system.

The board member timecards will need to be signed off if the Board Meeting pay code is present. The board members will not be required to approve their timecards, unless the agency or board requires it.

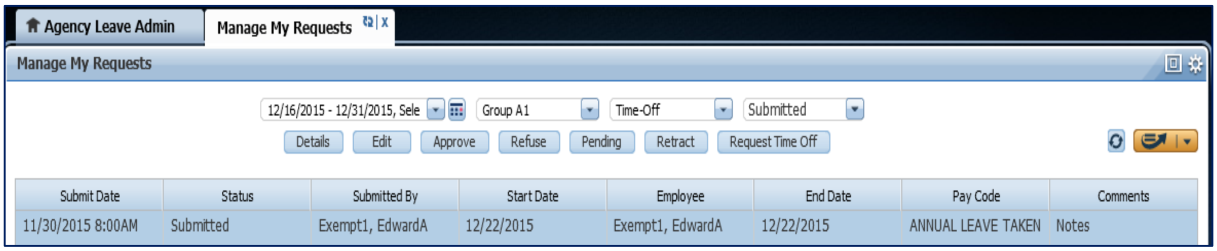
Pay Period Close and Sign-Off

NOTE: To retrieve shorter, more manageable employee listings, set up HyperFind queries by agency/division. See separate section for creating HyperFind queries.

Also, a **Sign-Off Preparation Checklist** job aid is available on the eSTART Online Resources website.

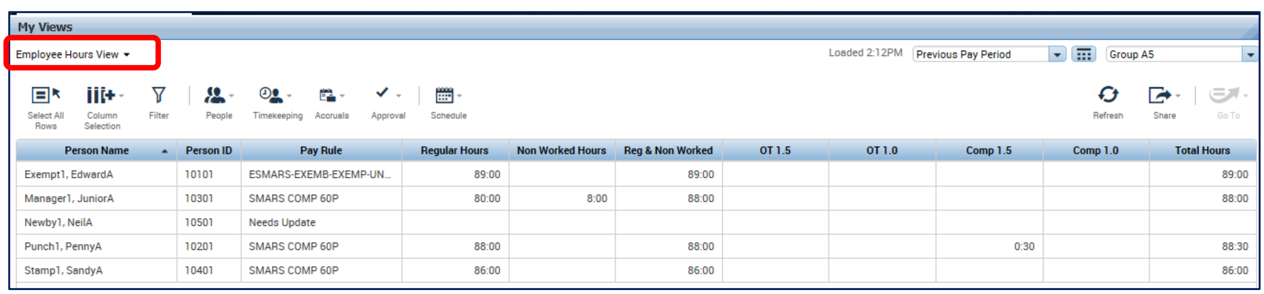
Sign-Off Preparation

1. Begin by accessing the **Manage My Requests** widget to ensure that all time off requests have been appropriately acted upon. This widget is accessed from **Related Items>Manage My Requests** or from the **Go To** icon. Any requests in Submitted or Cancel Submitted status must be addressed.



NOTE: If unapproved time off requests are present, the manager will receive a notification the second day after the end of the pay period. On the third day, if unapproved time off requests are still present, the administrators and timekeepers receive the notification.

2. Close the **Manage My Requests** tab and select **My Views>Employee Hours View** in the previous pay period. This provides a view of employee regular hours, non-worked hours, total hours, overtime and comp hours. Review the information on this page for any possible issues with employee time and correct any missing or incorrect time as needed.

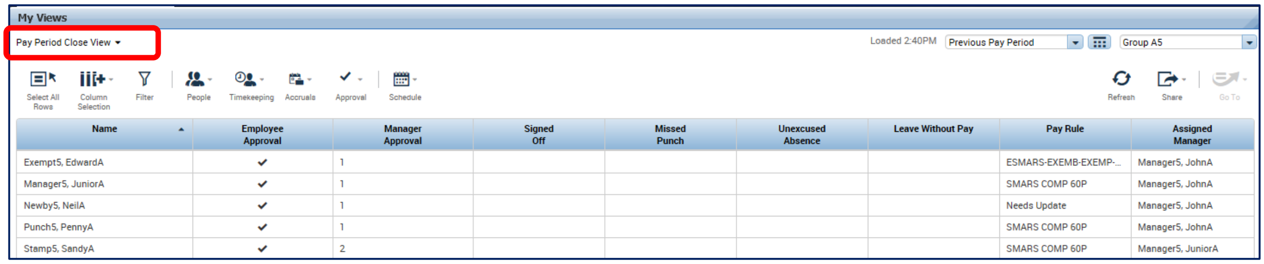


3. Highlight any employee(s) in the list whose total hours do not appear to be correct. Select **Go To>Timecards** to review the hours and make any needed corrections.

NOTE: If an exempt employee has too many total hours due to a partial day time off request, see the **Partial Time Off Request Exempt Employee** job aid on the eSTART Online Resources website.

4. Once review is complete, close the **Timecards** tab. To review the hours again, select the **Refresh** button on **Employee Hours View**.

5. Select **Pay Period Close View**.
6. Select **Arrears Employees** from the Show drop-down. Then select **Previous Pay Period** from the Time Period drop-down.



7. Indicators for each column are below. Visual indicators are also present within the timecard to determine the level of approval. See table below for description.
   a. A check mark in the **Employee Approval** column indicates employee approval.
   b. A **1** in the **Manager Approval** column indicates one manager has approved. The number will change if more than one manager approves. **Any missing manager approvals should be obtained before sign-off is performed**.
   c. A check mark in the **Missed Punch** or **Unexcused Absence** column indicates the presence of these exceptions in the timecard.
   d. If a check mark is present in the **Unexcused Absence** column **AND** an amount is present in the **Leave Without Pay** column, this is an acceptable exception. However, go to the employee timecard to determine if any other unexcused absences are present that DO NOT have LWOP. These should be corrected by the manager.
   e. If **Needs Update** displays in the **Pay Rule** column for an employee, the employee information must be updated in the People Editor before sign-off can occur. This occurs once all approvals are applied in the payroll system and passed to eSTART. If the pay rule is not updated before the sign-off date in eSTART, entries must be completed in the payroll system to ensure the employee is paid correctly.
8. Click on any column header to sort indicators to the top of the list.

VERY IMPORTANT: Managers must correct any unexcused absences and missing punches before sign-off can be completed.

Approval Type	Visual Indicator
Employee approval	When a timecard is approved by an employee, the cells in the timecard turn **light tan or orange**.
Manager approval	When a timecard is approved by a manager, the cells in the timecard turn **light yellow**.
Employee and Manager approval	When a timecard is approved by both an employee and a manager, the cells in the timecard turn **light green**.
Agency Administrator Sign off	When a timecard is signed off, the cells in the timecard turn **light gray**.

Sign-Off

NOTE: The Timekeeper role will not have access to the Sign-Off functionality.

On the 5th business day before each payday, a sign-off reminder notification will be sent to Agency Administrators and sign-off must be completed by noon on that day. The date is located from the payroll system monthly calendar that is sent to all administrators.

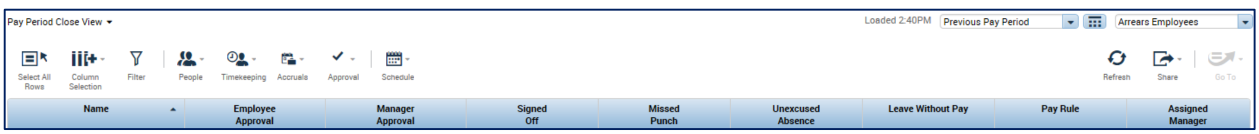
Once all exceptions have been corrected and all approvals obtained, the timecards are ready for sign-off.

VERY IMPORTANT! Sign-off for each of the items below must be done separately.

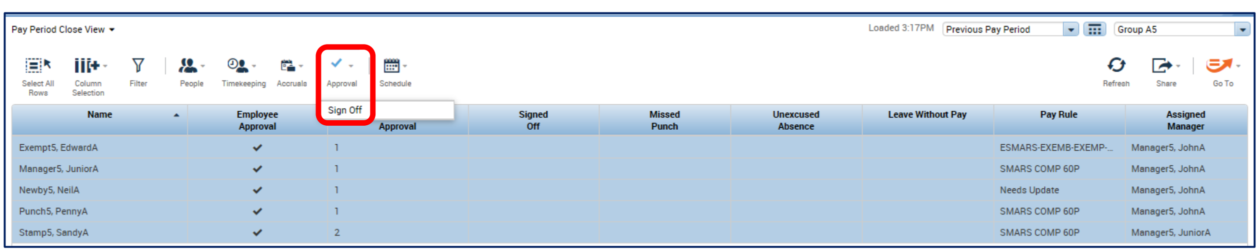
- Sign-off for **Arrears** employees should be completed in **Previous Pay Period**.
- Sign-off for **Current** employees should be completed in **Current Pay Period**.
    - Not all agencies will have employees paid in the current pay period.

Arrears Employee Sign-off

1. From **Pay Period Close,** choose all **Arrears** employees in the list using the **Arrears Employees** selection in the Show drop-down.
2. Choose **Previous Pay Period** from the Time Period drop-down.
3. Use **Select All Rows** to select all the employees in the list.



4. Select **Approval>Sign Off** to sign-off on all timecards.
5. The message **Are you sure you want to Sign Off?** displays. Click **Yes.**
6. Click the **Refresh** button to view the check marks in the **Signed Off** column.
7. Click the **Signed Off** column header once to sort any non-signed off timecards to the top of the list. Review these and if necessary, make corrections and apply sign-off ONLY to these timecards.



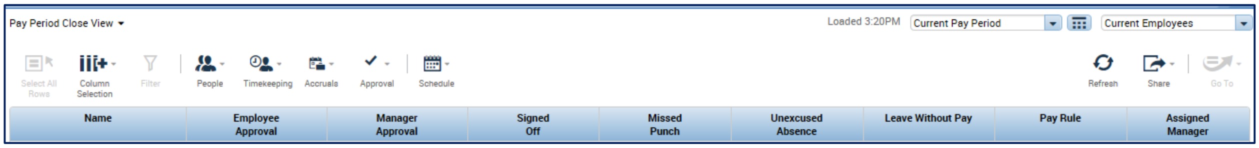
IMPORTANT NOTE!
DO NOT re-apply sign-off to timecards that are already signed off. This will apply the sign-off to the <u>Current Pay Period</u>.

After sign-off is complete, check for any failures from **Related Items>Group Edit Results** (See section below for viewing Group Edit Results).

If for some reason sign-off needs to be removed, contact your eSTART Administrator.

Current Employee Sign-Off

1. From **Pay Period Close,** choose all **Current** employees in the list using the **Current Employees** selection in the Show drop-down.
2. Choose **Current Pay Period** from the Time Period drop-down.
3. Use **Select All Rows** to select all the employees in the list.



4. Select **Approval>Sign Off** to sign-off on all timecards.
5. The message **Are you sure you want to Sign Off?** displays. Click **Yes.**
6. Click the **Refresh** button to view the check marks in the **Signed Off** column.
7. Click the **Signed Off** column header once to sort any non-signed off timecards to the top of the list. Review these and if necessary, make corrections and apply sign-off again ONLY to these timecards.

After sign-off is complete, check for any failures from **Related Items>Group Edit Results** (see next section for instructions).

VERY IMPORTANT: All employee timecards MUST be signed off by the agency. No employee data is sent to the payroll system for timecards that are not signed off.

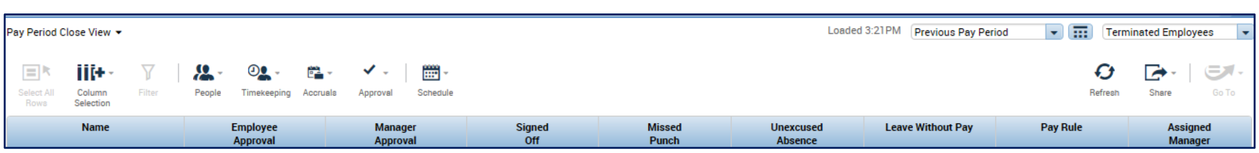
If for some reason sign-off needs to be removed, contact your eSTART Administrator.

Terminated Employee Sign-Off

As instructed earlier, the timecard of a terminated employee should be signed off as soon as the employee completes his last day at the agency and the manager approval is applied. However, this should be verified to ensure these timecards have been signed off.

NOTE: The **Terminated Employees** HyperFind must be used to retrieve employees in terminated status.

1. From **Pay Period Close,** choose all **Terminated** employees in the list using the **Terminated Employees** selection in the Show drop-down.
2. Choose **Previous Pay Period** from the Time Period drop-down.
3. Use **Select All Rows** to select all the employees in the list.



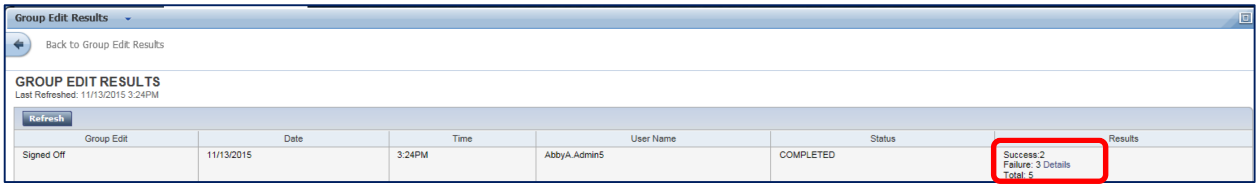
4. Follow the process above to sign-off on all timecards.

VERY IMPORTANT! DO NOT update or sign-off on an employee's timecard for any pay period following their last day at the agency. This will be the responsibility of the current agency.

Group Edit Results

This page is used to display the success or failure of the sign-offs.

Go to the **Related Items** pane and select **Group Edit Results**.



In the **Results** column, the number of successful sign-offs display here, as well as the number of failed ones.

1. If failures are present, the word **Details** is a link. Select the link to open the error log. A new section of the page will display the failure reason in the Error Description column. The Employee Name displays as well. The manager or manager delegate must correct the timecards before sign-off can be performed on these timecards.

NOTE: If a timecard has already been signed off due to resignation or transfer, this would cause a sign-off failure, but would not require correction.

2. Once errors have been corrected, close the **Group Edit Results** tab and return to the **Pay Period Close View.** Select the remaining employees and sign-off again.

Return to **Related Items>Group Edit Results** to verify there are no remaining exceptions that require correction.

NOTE: An individual timecard sign-off error will not display from **Group Edit Results**. It is used only for *group* edit results. Sign-off on an individual timecard may be verified from the employee timecard.

Also, a signed-off individual timecard will display in a light gray color.

Date	Pay Code	Amount	In	Out	Tran...	In	Out	Transf...	Shift	Daily	Period
Mon 7/...	4th Day of July	8:00								8:00	8:00
Tue 7/05			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	16:00
Wed 7/...			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	24:00
Thu 7/07			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	32:00
Fri 7/08			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	40:00

HyperFind Query Setup by Agency/Division

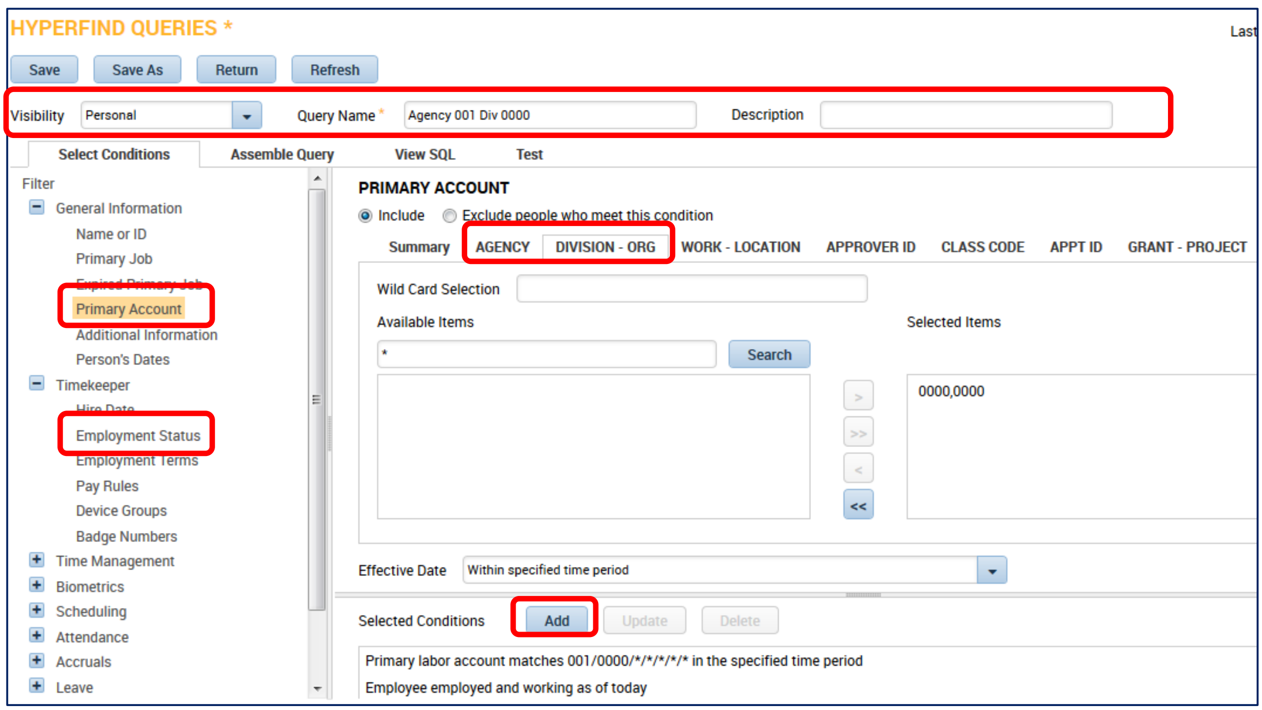
HyperFind Queries are used to filter and retrieve lists of employees who meet a specific set of criteria, for example, all employees in a specific agency or division. In this example, we will create a query to retrieve all employees in the agency for division 0000.

Creating a New HyperFind Query

1. From the **Related Items** pane, select **Setup**, then select **HyperFind Queries**.
2. Select the **New** button. The **HyperFind Queries** screen displays.
3. Select **Personal** from the **Visibility** drop-down.

   NOTE: Ad Hoc creates a temporary query. **Personal** creates a permanent query, visible only to the person creating it. This type of query may be shared with others but must be assigned. See steps in **Assigning a Personal HyperFind Query to Another Person** section below.

4. Enter the name of the new query in the **Query Name** field. The **Description** field is optional.

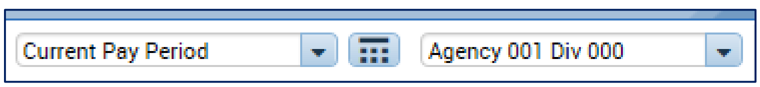


5. Select **Filters>General Information>Primary Account**.
6. Select the **Agency** tab. Click the **Search** button for the **Available Items** field. The agency should display in the field. Highlight the agency, then select the right single arrow button. The information will be placed in the **Selected Items** field to the right.
7. Select the **Division–Org** tab.
8. Enter all or some portion of the division-org number. Click the **Search** button for the **Available Items** field. A listing of **Division-Orgs** displays.

9. Choose **0000** from the list, then the right single arrow button. The information will be placed in the **Selected Items** field to the right. **NOTE:** Hold down the **CTRL** key to select more than one division-org.
10. From the **Effective Date** drop-down, select **Within specified time period.**
11. Select **Add** button. The condition is added to the **Selected Conditions** window.
12. From the Filters menu, expand the **Timekeeper** category. Select **Employment Status.** The default fields are **Active** and **As of today**, so no change is needed**.** Select **Add Condition.** This will ensure that only active status employees will be returned by the query.
13. To test the query, select the **Test** tab. A listing of employees should display.
14. If correct, select **Save**.

NOTE: HYPERFIND in the upper left-hand corner will display as ***HYPERFIND QUERIES** in orange font until saved.

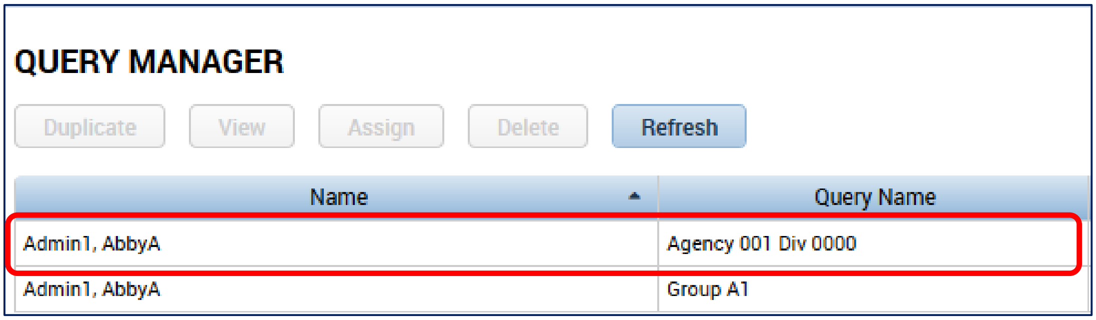
15. Close the **Setup** tab.
16. Select the **Refresh** icon on the **Agency Leave Admin** workspace tab. You now have access to the HyperFind from any of your Show drop-downs.
17. Select the new HyperFind from the drop-down to filter the employee listing.



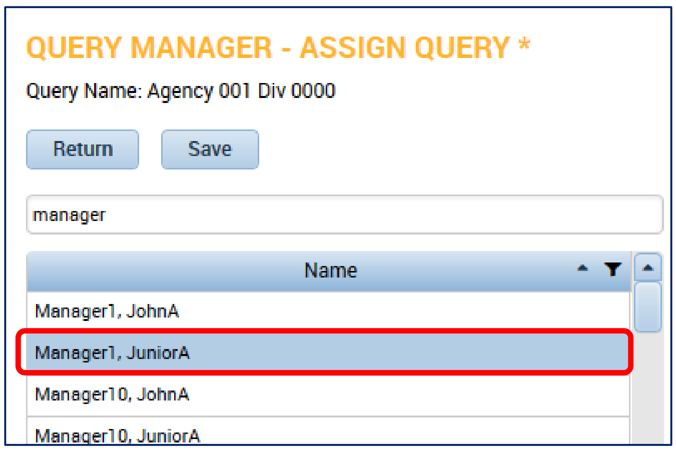
NOTE: If a public HyperFind query is needed, contact your eSTART Administrator.

Assigning a Personal HyperFind Query to Another Person

1. From the **Related Items** pane, select **Setup**. Then select **Query Manager**.

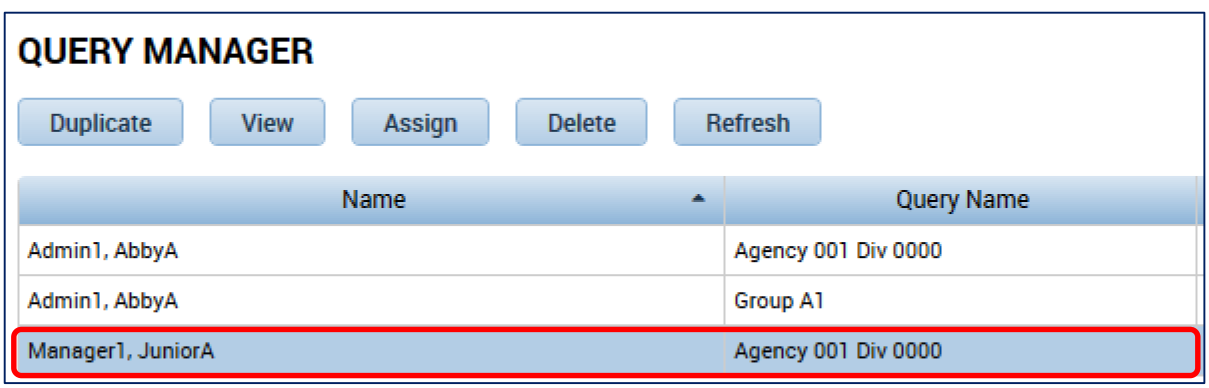


2. Your list of personal HyperFind Queries displays. Select the query to be assigned, then the **Assign** button. The **Assign Query** window displays with a list of available names. A **Search** field is available to narrow the search, if needed.



3. Select the desired name. **NOTE:** Hold down the **CTRL** key to assign the query to more than one person.

4. Select the **Save** button. The **Query Manager** screen displays in order to view the assignment.



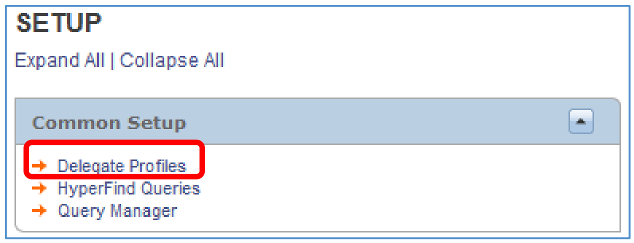
The assigned person now has access to the HyperFind from any of their Show drop-downs.

Delegate Profile Setup (Short-Term Delegation)

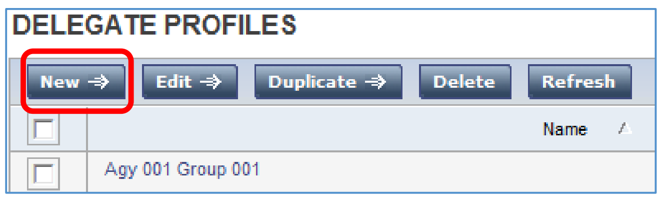
The Delegate Profile is used by managers to temporarily delegate their eSTART duties to another manager when away from the office. It contains a listing of other division managers to which duties can be delegated. Delegate profile setup is a two-step process you must complete for each division in your agency.

Delegate Profile Setup (Step 1)

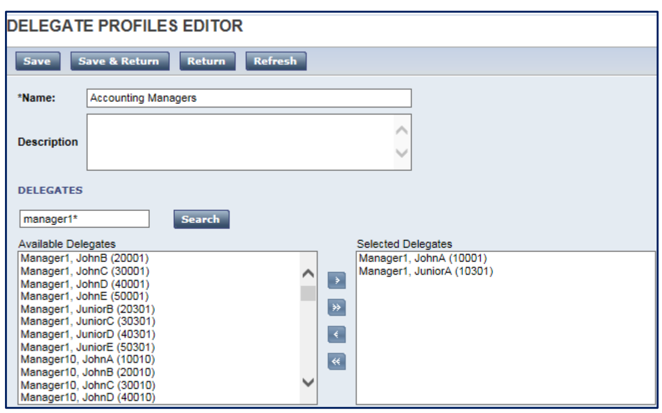
1. From the **Related Items** pane, select **Setup.** Then select **Delegate Profiles**.



2. Select **New** from the **Delegate Profiles** screen.



3. The screen below displays. Enter the name of the profile in the **Name** field.
4. Select the **Search** button to retrieve a list of manager delegates. To narrow the search, enter a letter or letters of the last name in front of the asterisk (*), then select **Search**.



5. The **Available Delegates** display. Select the desired delegate(s), then the right arrow button to move from **Available Delegates** to **Selected Delegates**.

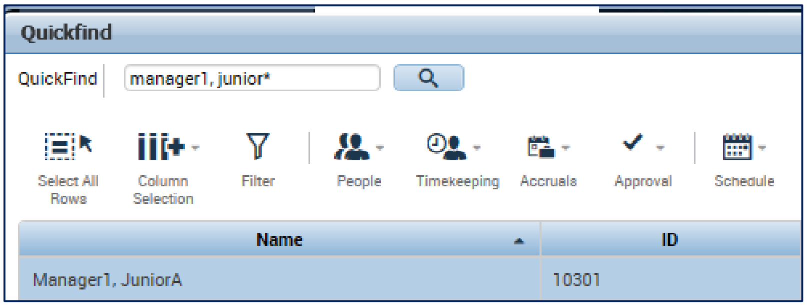
NOTE: To select more than one delegate, hold down the CTRL key and click on each name, then the right arrow button. Additionally, if a new manager is added, the agency administrator will need to manually add the new manager to the delegate profile.

6. Select the **Save** button.

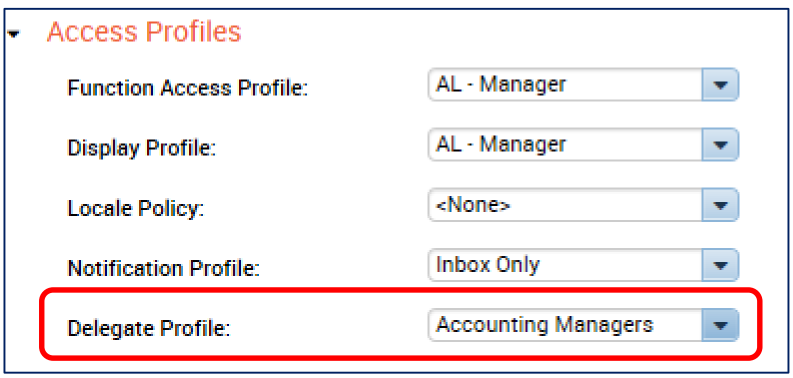
Assigning the Delegate Profile to the People Editor (Step 2)

The Delegate Profile must be added to the manager's People Editor in order to be used.

1. From the Agency Administrator workspace, select **Related Items>Quickfind** or any of the widgets to select multiple employees.



2. Locate manager(s) to be added to the delegate profile.
3. Highlight the manager name(s).
4. Select **People>Edit**.
5. Select **Job Assignment** tab.
6. Select **Access Profiles**.



7. Select the delegate profile name from the **Delegate Profile** drop-down.
8. Click **Save.**

The delegates should now be available on the Temporary Delegate pane. Refer to the **Manager Delegation for Requesting Backup Coverage** job aid for assistance.

9. Repeat for each manager.

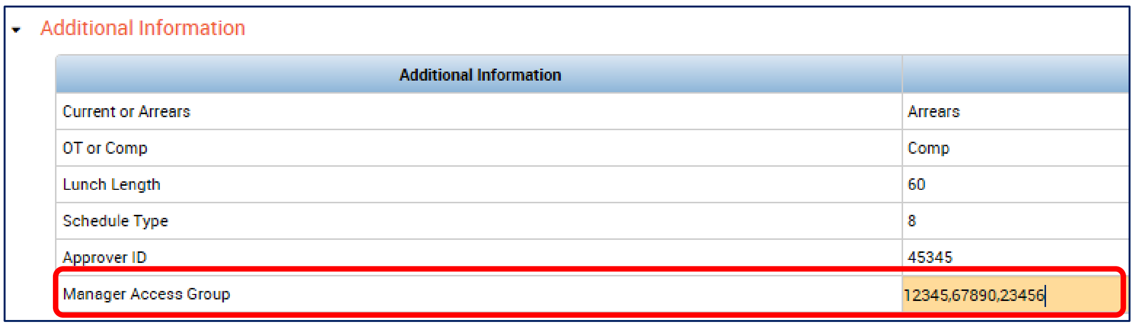
NOTE: A person cannot edit his/her own People Editor record. For those who need to be added to the new Delegate Profile, Step 2 - Assigning the Delegate Profile to the People Editor will need to be completed by another Agency Administrator.

Delegate Manager Setup (Long-Term Delegation)

This process is used to grant a non-manager the long-term ability to complete manager functions for specified manager(s). It should **only** be used for **long-term delegation**.

For **short-term delegation coverage**, such as leave time with a specific end date, the Manager Delegation process should be used. This is accessed from **Related Items>Temporary Delegation**.

1. From **Reconcile Timecard View** or **Related Items>Quickfind**, select the name of the person to be designated as the Delegate Manager. Choose **People>Edit** from the menu.
2. In the People Editor, from the **Person** tab, select **Additional Information** from the left menu.
3. In the **Manager Access Group** field, key the Employee ID number(s) of the manager(s) whose employees are being delegated.

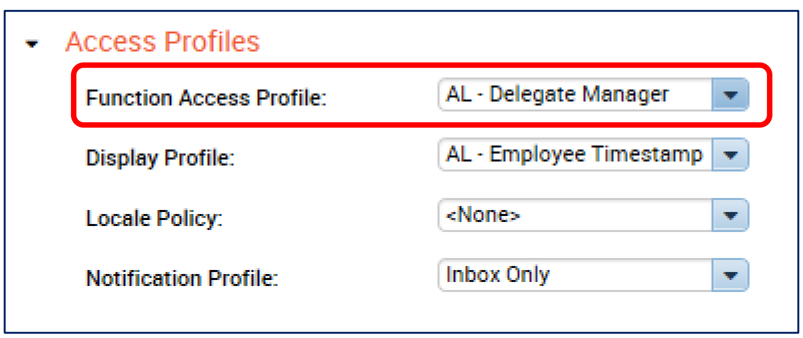


Additional Information

Additional Information	
Current or Arrears	Arrears
OT or Comp	Comp
Lunch Length	60
Schedule Type	8
Approver ID	45345
Manager Access Group	12345,67890,23456

NOTE: More than one ID may be keyed, but no more than 11 are allowed. The ID(s) should be keyed in the format below, with a comma separating each number and no spaces: i.e. 12345,56789,90123.

4. Select the **Job Assignment** tab. Select **Access Profiles** from the left menu. From the **Function Access Profile** drop-down choose **AL-Delegate Manager**. Select **Save**.



NOTE: These changes will not become effective until the following business day.

Rules, Cascades and Interfaces

Holiday Credit Rules

For most employees, the holiday will be credited if the employee is in pay status any portion of the work day before and the day after the holiday. One exception to this is a part-time or hourly employee.

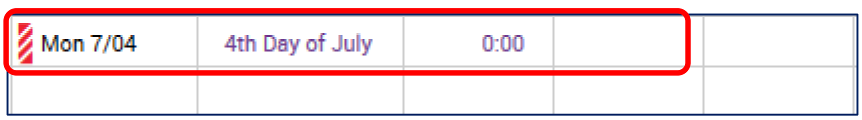
Part-time Employees

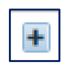
Part-time employees receive holiday credit based on their schedule. If the holiday falls on a scheduled work day and the employee is in pay status the day before and after, the holiday will be granted based on the scheduled number of hours for that day.

If the employee is not scheduled to work on the holiday, no credit will be granted.

Hourly Employees

Hourly employees **will not** automatically receive holiday credit. The timecard will have a placeholder displaying the holiday, but no credit will actually be given to the employee. Therefore, the holiday will need to be manually added to the timecard for the eligible hourly employee.



1. On the date of the holiday, select the **Insert Row** button. 
2. Select **Holiday Earned** from the **Pay Code** drop-down list.
3. In the **Amount** column, key the number of hours for the holiday.
4. Select the **Save** button.
5. If the employee observed the holiday, insert a second row to the timecard and select **Holiday Bank Taken** in the **Pay Code** column. Enter the number of Holiday hours taken in the **Amount** column. Reminder: punches cannot be entered on the same line as the holiday.
6. Select the **Save** button.

NOTE: The **Totals** tab of the timecard displays the number of **Holiday Bank Taken** hours and the **Holiday Earned** hours.

Timestamp/Punch Employee

Timestamp/Punch full-time employees automatically receive holiday credit if the employee is in pay status the scheduled day before and scheduled day after a holiday.

The timecard below is an example that reflects eight hours of holiday credit. The **Holiday Taken** and **Holiday Earned** pay codes display on the **Totals** tab at the bottom of the timecard.

Date	Pay Code	Amount	In	Out	Tran...	In	Out	Transf...	Shift	Daily	Period	Schedule
Mon 7/04	4th Day of July	8:00								8:00	8:00	
												8:00AM-5:00PM
Tue 7/05			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	16:00	8:00AM-5:00PM
Wed 7/06			8:00AM	11:00AM		12:00PM	5:00PM		8:00	8:00	24:00	8:00AM-5:00PM
Thu 7/07			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	32:00	8:00AM-5:00PM
Fri 7/08			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	40:00	8:00AM-5:00PM

Totals Accruals

All | All

Account	Pay Code	Amount
001/0000/100010/10001/10586/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10001/10586/-/-	HOLIDAY TAKEN	8:00
001/0000/100010/10001/10586/-/-	REGULAR	32:00

If the employee works on the holiday, the hours worked display on the timecard. The holiday credit hours are reflected by the **Holiday Earned** pay code, and the unworked hours automatically go to the **Holiday Taken** pay code. Any **Holiday Earned** hours that are not utilized on the holiday will be banked for use at a later time.

Date	Pay Code	Amount	In	Out	Tran...	In	Out	Transf...	Shift	Daily	Period	Schedule
Mon 7/04	4th Day of July	4:00										
			8:00AM	12:00PM					4:00	8:00	8:00	8:00AM-5:00PM
Tue 7/05			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	16:00	8:00AM-5:00PM
Wed 7/06			8:00AM	11:00AM		12:00PM	5:00PM		8:00	8:00	24:00	8:00AM-5:00PM
Thu 7/07			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	32:00	8:00AM-5:00PM
Fri 7/08			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	40:00	8:00AM-5:00PM

Totals Accruals

All | All

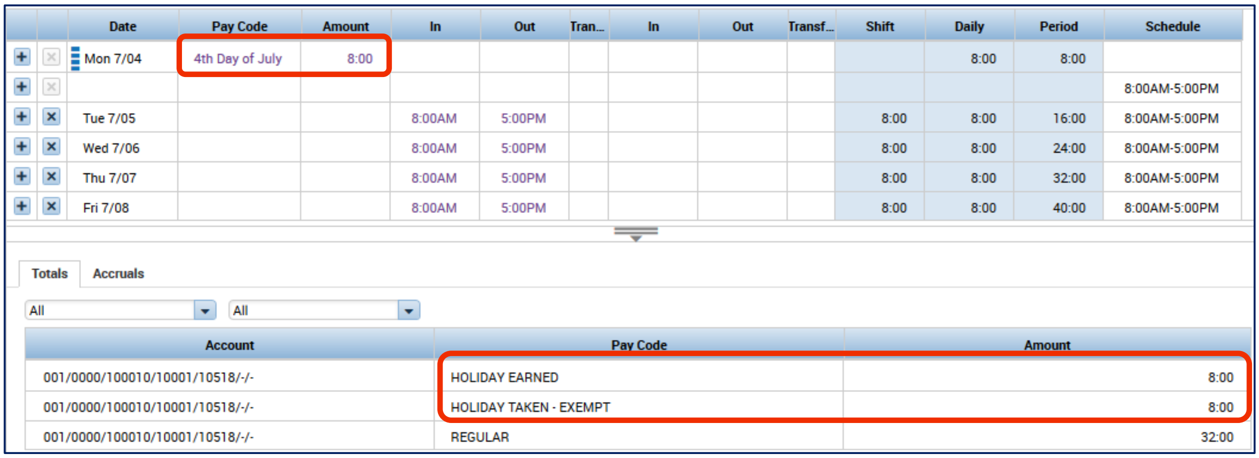
Account	Pay Code	Amount
001/0000/100010/10001/10586/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10001/10586/-/-	HOLIDAY TAKEN	4:00
001/0000/100010/10001/10586/-/-	REGULAR	36:00

NOTE: If the employee is not in pay status the day scheduled day before or scheduled day after the holiday, the holiday will not be earned. In this case, the manager or Agency Admin must add the pay code for **Leave Without Pay** to the timecard on the date of the holiday to prevent the employee being paid for the holiday.

Exempt Employees

Full-time, exempt employees will automatically receive credit for a holiday but must be in pay status the work day before and after the holiday. The manager does not have to make any changes to the timecard for the employee to receive credit. However, the holiday credit may need to be replaced with Leave Without Pay, if the employee is not eligible for the holiday, based on the agency's policy for pay status.

For exempt employees, the **Holiday Earned** and **Holiday Taken – Exempt** pay codes display with the number of holiday hours granted to the employee based on their work schedule.



Date	Pay Code	Amount	In	Out	Tran...	In	Out	Transf...	Shift	Daily	Period	Schedule
Mon 7/04	4th Day of July	8:00								8:00	8:00	
												8:00AM-5:00PM
Tue 7/05			8:00AM	5:00PM					8:00	8:00	16:00	8:00AM-5:00PM
Wed 7/06			8:00AM	5:00PM					8:00	8:00	24:00	8:00AM-5:00PM
Thu 7/07			8:00AM	5:00PM					8:00	8:00	32:00	8:00AM-5:00PM
Fri 7/08			8:00AM	5:00PM					8:00	8:00	40:00	8:00AM-5:00PM

Totals | Accruals

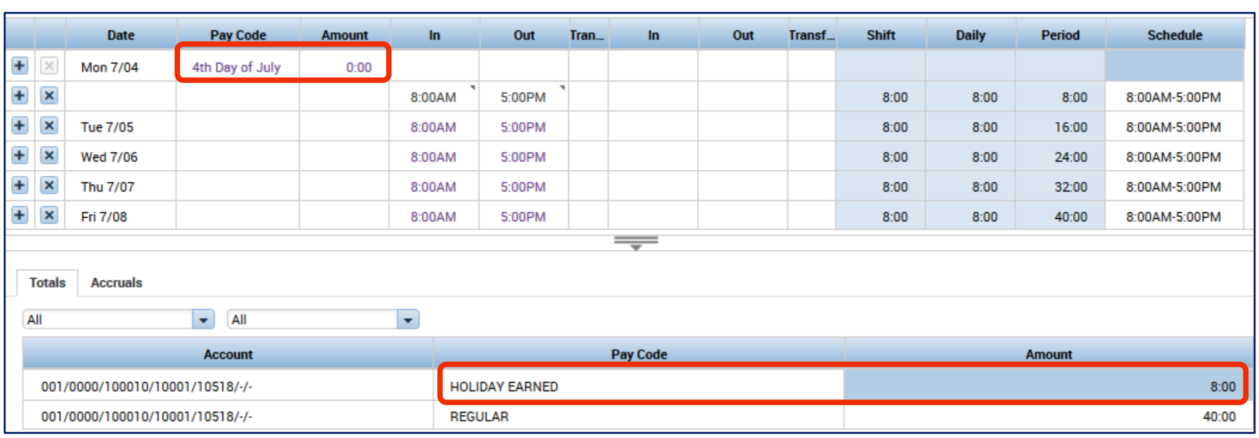
All | All

Account	Pay Code	Amount
001/0000/100010/10001/10518/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10001/10518/-/-	HOLIDAY TAKEN - EXEMPT	8:00
001/0000/100010/10001/10518/-/-	REGULAR	32:00

If the exempt employee works on the holiday and should bank the holiday hours to be used at a later date, the manager will need to make adjustments to the timecard to reflect the correct hours worked.

NOTE: The employee also has the option of punching their time when working on a holiday.

- Using the "insert row" icon located to the left of the date of the holiday, insert an additional row into the timecard.
- In the **In** and **Out** columns, enter the time that reflects the schedule that the employee worked. Reminder: punches cannot be entered on the same row as the holiday.
- Select the **Save** button. Notice the **Holiday Earned** pay code below.



Date	Pay Code	Amount	In	Out	Tran...	In	Out	Transf...	Shift	Daily	Period	Schedule
Mon 7/04	4th Day of July	0:00										
			8:00AM	5:00PM					8:00	8:00	8:00	8:00AM-5:00PM
Tue 7/05			8:00AM	5:00PM					8:00	8:00	16:00	8:00AM-5:00PM
Wed 7/06			8:00AM	5:00PM					8:00	8:00	24:00	8:00AM-5:00PM
Thu 7/07			8:00AM	5:00PM					8:00	8:00	32:00	8:00AM-5:00PM
Fri 7/08			8:00AM	5:00PM					8:00	8:00	40:00	8:00AM-5:00PM

Totals | Accruals

All | All

Account	Pay Code	Amount
001/0000/100010/10001/10518/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10001/10518/-/-	REGULAR	40:00

Notice the holiday credit amount in the timecard is now zero and only eight hours of **Holiday Earned** displays in the lower portion of the timecard**.** The **Holiday Taken-Exempt** pay code no longer displays.

Non-Traditional Employees

Non-Traditional employees are those whose work schedules fall outside of the normal Monday through Friday work week. For example, those who work overnight shifts or those who work four 10-hour days a week are considered non-traditional employees.

Non-Traditional employees will automatically receive holiday credit hours based on their schedule type. That is, whether their schedule requires an 8, 10, 12 or 24 hour day. eSTART will apply 8, 10, 12 or 24 hours of **Holiday Earned** for these employees, provided the employee is in pay status on the scheduled day before and scheduled day after the holiday. The **Holiday Earned** hours will be automatically banked.

NOTE: The holiday will be credited even if the employee is not scheduled to work on the holiday, provided they are in pay status the scheduled work day before and after.

If the employee is not in pay status the scheduled day before or scheduled day after the holiday, the holiday will not be earned. In this case, the manager or Agency Admin must add the pay code for **Leave Without Pay** to the timecard on the date of the holiday to prevent employee payment for the holiday.

A Holiday is a Regular Work Day for a Non-Traditional Employee

For a non-traditional employee, a holiday is considered a regular work day. Therefore, if the holiday is a scheduled work day, <u>the employee must account for the total number of hours on the scheduled work day</u>.

In the example below, the employee received ten hours of **Holiday Earned**. He also worked seven hours on the holiday. If the employee is scheduled and works on the holiday, the hours worked go to either regular or comp/overtime. The holiday hours are still granted and banked for the **Holiday Earned** time.

Since the employee worked seven hours but was scheduled to work ten hours, three hours of leave must be used for the remainder of the scheduled day.

Date	Pay Code	Amount	In	Out	Tr...	In	Out	Tr...	Shift	Daily	Period	Schedule
Mon 7/04	4th Day of July	10:00										
	SICK LEAVE TAKEN	3:00								3:00	3:00	
												7:00AM-1:00PM
												4:00PM-5:30PM
Tue 7/05			7:00AM	12:00PM		12:30PM	5:30PM		10:00	10:00	13:00	7:00AM-5:30PM
Wed 7/06			7:00AM	12:00PM		12:30PM	5:30PM		10:00	10:00	23:00	7:00AM-5:30PM
Thu 7/07			7:00AM	12:00PM		12:30PM	5:30PM		10:00	10:00	33:00	7:00AM-5:30PM
Fri 7/08											33:00	

Totals Accruals

All All

Lo...	Job	Account	Pay Code	Amount
		031/0000/420005/64036/60150/-/-	HOLIDAY EARNED	10:00
		031/0000/420005/64036/60150/-/-	REGULAR	30:00
		031/0000/420005/64036/60150/-/-	SICK LEAVE TAKEN	3:00

Bereavement Rules

Bereavement

When an employee takes leave for bereavement and does not have a sufficient sick leave accrual balance, the appropriate bereavement payback agreement document must be completed by the employee and forwarded to the Timekeeper/Agency Administrator.

The Timekeeper/Agency Administrator will add the **SICK LEAVE BEREAVEMENT OWED** pay code to the employee's timecard. The amount owed will display a negative balance in the employee's accruals until the balance is paid back.

Thu 11/12	SICK LEAVE BEREAVEMENT OWED	8:00
Fri 11/13	SICK LEAVE BEREAVEMENT OWED	8:00
Sat 11/14	SICK LEAVE BEREAVEMENT OWED	8:00
Sun 11/15		

The bereavement time will then be paid back based on the payback agreement established by the agency. <u>Bereavement payback will continue to be handled in the payroll system</u>. The totals will be updated in eSTART through an interface from the payroll system.

NOTE: A HyperFind Query for **Bereavement Leave Owed** is available to allow an easy way to track employees who have a negative bereavement owed balance.

Accrual Code	Balance
COMP OVERAGE	0:00
BEREAVEMENT OWED	-19:45
ANNUAL LEAVE	32:30

Cascades

Annual Leave Cascade

A cascade defines how leave time is processed in the system. If the employee does not directly select Comp Time, Excess Annual Leave, etc. when submitting their request, but selects Annual Leave instead, their leave will be used, based on the time of the year, in the order as described in the chart below:

Annual Leave Cascade	
January 1 – July 31	**August 1 – December 31**
Comp Time	Personal Day
Excess Annual Leave	Excess Annual Leave
Annual Leave	Comp Time
	Annual Leave

NOTE

The following are not impacted by the cascade:

- The employee should follow the agency's policy and procedures regarding the usage of personal leave days before August 1st.
- Holiday banked time should be scheduled by the supervisor in the quarter in which it was earned.

If the cascade makes a change to the type of leave originally submitted, the timecard will display the information as indicated below.

In this example, the original request was for two hours of annual leave. Since the employee had one hour of Comp Time and also had Excess Annual Leave time, the cascade reversed the original request for annual leave, used the Comp Time first, then the Excess Annual Leave.

ANNUAL LEAVE CASCADE	-2:00					
COMP TIME CASCADE	1:00					
EXCESS ANNUAL CASCADE	1:00					
		7:29AM	1:31PM		6:00	
ANNUAL LEAVE TAKEN	2:00	1:30PM				8:00

A comment is added to each entry in the timecard to indicate the change was made by the cascade. These comments may be viewed from **Go To>Audits.** Select **Comments** from the **Category** drop-down to view the comments.

Date	Time	Type	User	Comment
Wed 3/23	6:29AM	Punch		Early - Approved
Fri 3/25		Pay Code Edit	Import	Cascade Change
		Pay Code Edit	Import	Cascade Change
		Pay Code Edit	Import	Cascade Change

Interfaces

Compensatory Time Leave Payout

Comp Time hours over an employee's regular work hours are sent to a Comp Time Earned bucket. For non-law enforcement employees, the bucket limit is 240 hours. For law enforcement employees, the bucket limit is 480. Any hours earned that exceed the 240 or 480 limit are sent to a Comp Overage bucket.

Once an employee's balance reaches 220 hours for non-law enforcement or 440 hours for law enforcement, a notification is sent to the employee, the employee's manager, and all Agency Administrators indicating that the employee's Comp balance is nearing its limit and needs to be addressed. A liquidation request should then be sent to State Personnel.

eSTART has an automated interface to the payroll system that runs on Wednesday and Saturday each week. Any Comp Overage hours for the week will be added to the timecard on the current pay period and sent to the payroll system in the next extract file.

Extended Leave for Administrators

Importance

Purpose

It is important that the State of Alabama's leave policy rules are consistently and accurately administered. To make this happen, employees' paid and unpaid leave should be managed in an efficient and timely manner. The Leave application supports the ability to perform leave administration tasks.

eSTART Leave:

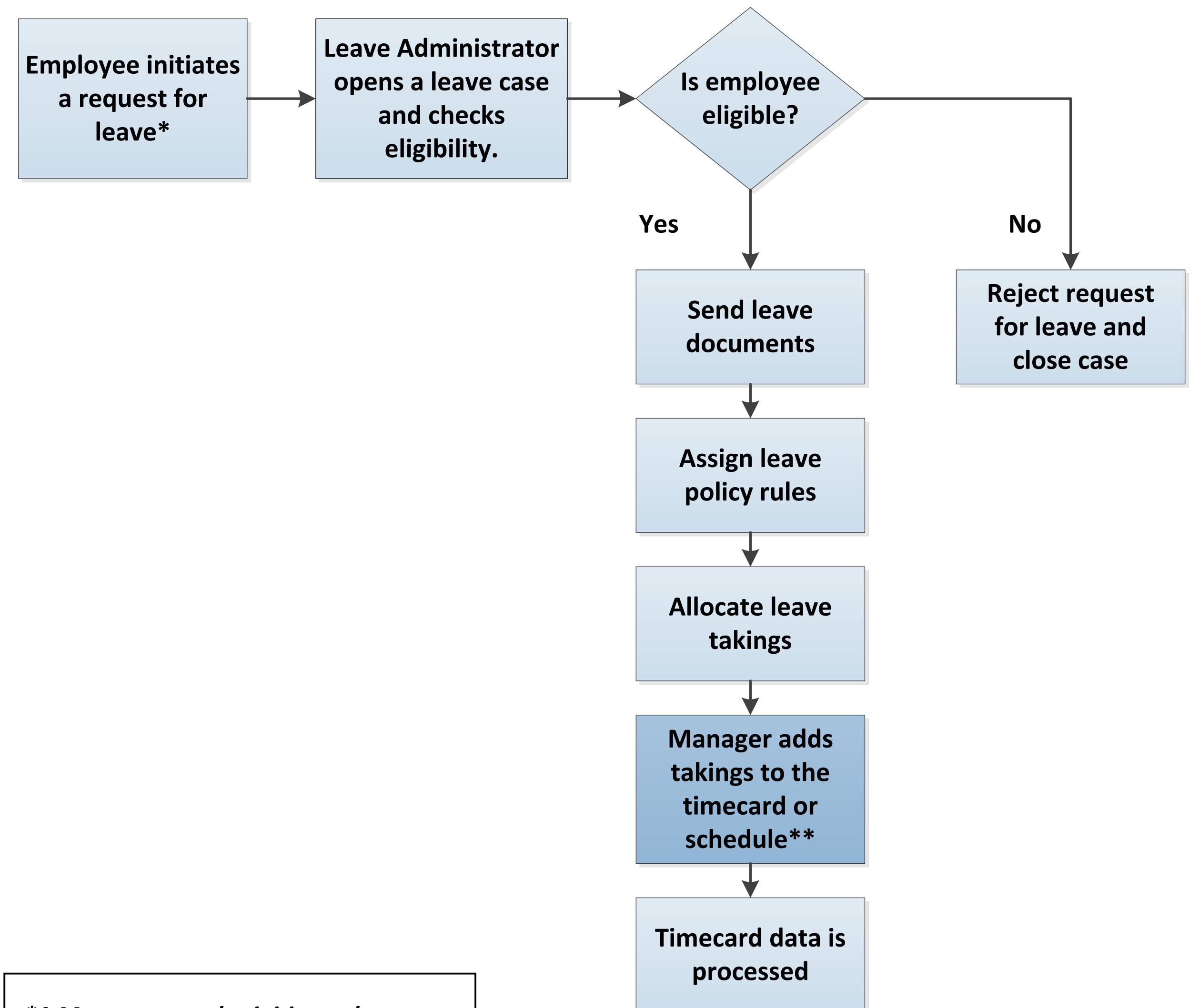
- Automates the process of administering leave policies.
- Assists the State of Alabama in achieving compliance with required federal and state mandates.

The Leave Process

Purpose

The Leave process automates the administering and tracking of paid and unpaid leave policies. Administrators can easily track both continuous and intermittent leave. In addition to centralizing administration of leave policies throughout the State of Alabama, employees benefit from the consistent application of leave policies to individual leave cases.

The following illustration shows the high-level process for administering leave cases.



**A Manager can also initiate a leave request on behalf of the employee.*

***The Manager may commit leave to the timecard. An employee may submit a time off request for an open and approved case.*

Roles and Responsibilities

Purpose

Each employee and manager has responsibilities that are important in the leave process. Each person's role determines his or her responsibilities, and the tasks that he or she performs in the application.

Common Employee Tasks

On an as-needed basis, employees perform the following tasks:

- Submit new leave case requests.
- Request time off for an open and approved leave case.
- Provide required leave documentation.
- Submit requests for additional leave, as needed.

Common Manager Tasks

On an as-needed basis, department managers perform the following tasks:

- Monitor leave events through leave views.
- Enter hours for employees' leave cases.
- Submit a leave case for an employee.
- Run leave reports

Common Leave Administrator Tasks

On an as-needed basis, typical Leave Administrator tasks include:

- Determine eligibility and open leave cases.
- Administer open leave cases, including documentation.
- Enter hours for employees' continuous leave cases.
- Run leave reports.

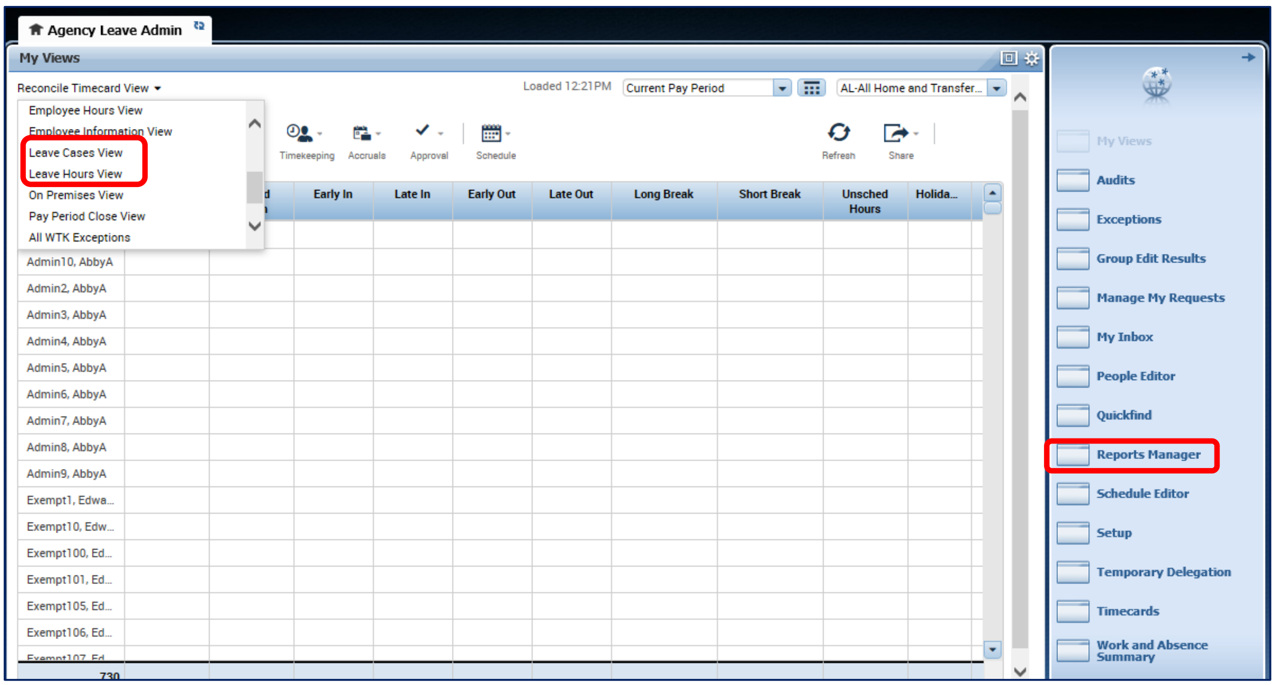
Managing Leave

Exploring Leave Tools in eSTART

Purpose

The navigator is your starting point for creating and maintaining your employees' time and leave information. There are three key tools available to assist you in performing common leave tasks, such as opening a new leave case, entering your employees' leave takings, and monitoring leave cases.

Key Leave Tools



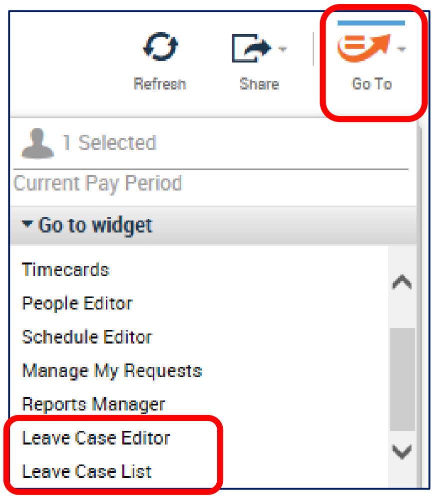
NOTE: The view above is the default view for an Agency/Leave Administrator.

Navigator area	Description
Manage Leave	Use the Manage Leave to review incoming leave messages and process leave requests.
My Inbox	Use My Inbox to view messages pertaining to Leave Cases. If an administrator uses an Agency email account, the message will be received in there as well.
My Views	Access the My Views workspace in eSTART to view Leave Views such as **Leave Hours View** and **Leave Cases View**. You can also use this workspace to access employee timecards for purposes of entering leave time for employees.
Reports Manager	Access the Reports Manager workspace in eSTART to run and view leave reports, such as the Leave Hours Detail and Leave Hours Summary reports.

Using the Tools in Leave Views

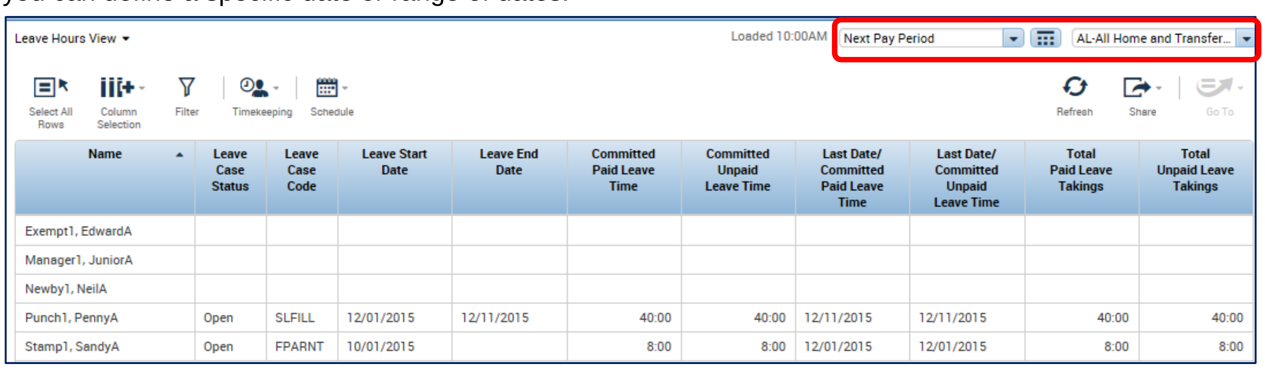
The **Go To** menu is located at the top right of the view, which allows you to quickly access editors and tools that display information specific to one or more employees. For example, select an employee and click the **Go To>Timecards** link to access the timecard for purposes of adding leave time; or select multiple employees and click **Go To>Reports Manager** to generate a report for only those selected employees. The **Leave Case Editor** is available from this menu to open a new case, or the **Leave Case List** is available when selecting and editing an existing case.

NOTE: This tool is common to both the **Leave Hours View** and the **Leave Cases View**.



The Show drop-down allows you select and display a specific group of employees. The default setting for the Show field when you log on is **All Home and Transferred In**, which displays all employees that report to you. You can use the Show field to further refine your selection.

The Time Period field allows you define the desired timeframe. The default setting for the Time Period field is **Current Pay Period**. You can select a predefined date period option, such as Previous Pay Period or, you can define a specific date or range of dates.



Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NeilA										
Punch1, PennyA	Open	SLFILL	12/01/2015	12/11/2015	40:00	40:00	12/11/2015	12/11/2015	40:00	40:00
Stamp1, SandyA	Open	FPARNT	10/01/2015		8:00	8:00	12/01/2015	12/01/2015	8:00	8:00

Tip

- Use the **Ctrl** key to select more than one employee not listed next to each other.
- Use the **Shift** key to select all employees listed between two employees, including the two employees.
- Click and drag the mouse to select employees.
- Choose **Actions>Select All** to select all employees.

Accessing Leave Views

Purpose

eSTART includes the following leave views:

- Leave Cases View
- Leave Hours View

You can use either of these views as a starting point for viewing and monitoring employee leave cases.

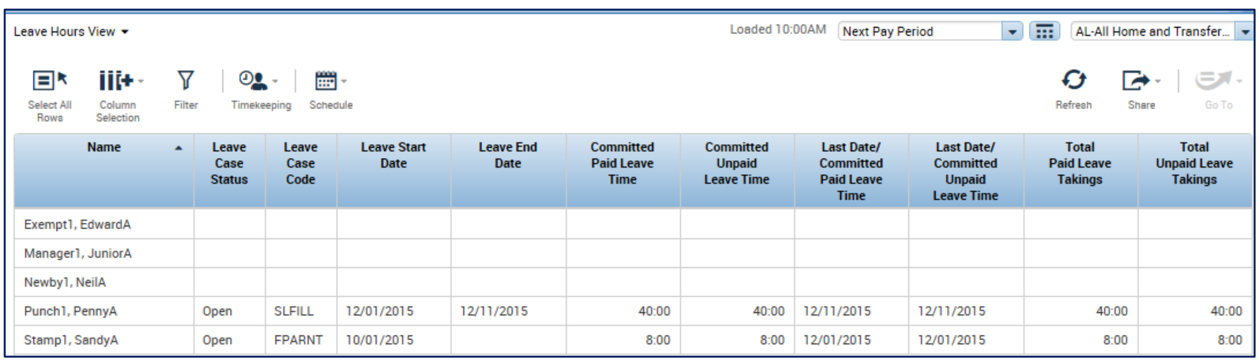
Exploring the Leave Hours View

The **Leave Hours View** is especially useful for viewing total leave hours. It also provides other information about each leave case in eSTART, including:

- Leave Case Status
- Last date of committed paid and unpaid leave time
- Leave end date (if one is provided)

This screen is used for reviewing leave cases, but may also be used to link to the **Leave Case Editor**.

Key Information in the Leave Hours View



Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NeilA										
Punch1, PennyA	Open	SLFILL	12/01/2015	12/11/2015	40:00	40:00	12/11/2015	12/11/2015	40:00	40:00
Stamp1, SandyA	Open	FPARNT	10/01/2015		8:00	8:00	12/01/2015	12/01/2015	8:00	8:00

Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period. Statuses may include: Open, Closed, Submitted, or Retracted.
Leave Case Code	Type of leave, such as Self or Family.
Leave Start Date	This is the first day that the employee goes on leave of absence.
Leave End Date	This is the employee’s expected return date.
Committed Paid/ Unpaid Leave Time	The Committed Paid Leave Time and Committed Unpaid Leave Time columns show the amount of paid and unpaid time that has been committed to the schedule or timecard in the selected time period.
Last Date/Committed Paid/Unpaid Leave Time	The Last Date/Committed Paid Leave Time and Last Date/Committed Unpaid Leave Time columns show the date of the last committed paid and unpaid amounts.
Total Paid/Unpaid Leave Time	The Total Paid Leave Takings and Total Unpaid Leave Takings columns show the total amount of paid and unpaid leave that an employee has taken.

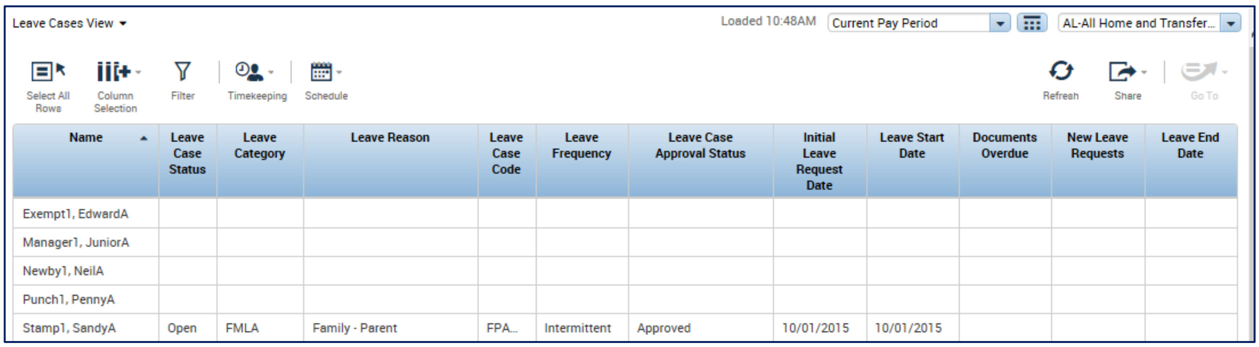
Exploring the Leave Cases View

The Leave Cases View is especially useful for viewing leave reasons and frequencies. It also provides other information about each leave case in eSTART including:

- Leave case status
- Leave category
- Initial leave request date

This screen is used for reviewing leave cases, but may also be used to link to the **Leave Case Editor**.

Key Information in the Leave Cases View



Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period. Statuses may include: Open, Closed, Submitted, or Retracted.
Leave Category	Type of leave, such as FMLA, Military or Educational.
Leave Reason	Indicates a more specific leave such as serious health condition or birth.
Leave Case Code	Type of leave, such as Self or Family.
Leave Frequency	Indicates whether the employee is on continuous or intermittent leave.
Leave Case Approval Status	Indicates whether a leave request is approved, pending or denied.
Initial Leave Request Date	Date the leave request was made.
Leave Start Date	Date leave starts for an employee.
Documents Overdue	A check in this column indicates that a document is overdue.
New Leave Requests	A check in this column indicates additional time requested on an existing leave case.
Leave End Date	The expected date on which an employee returns to work.

New or Submitted Leave Cases

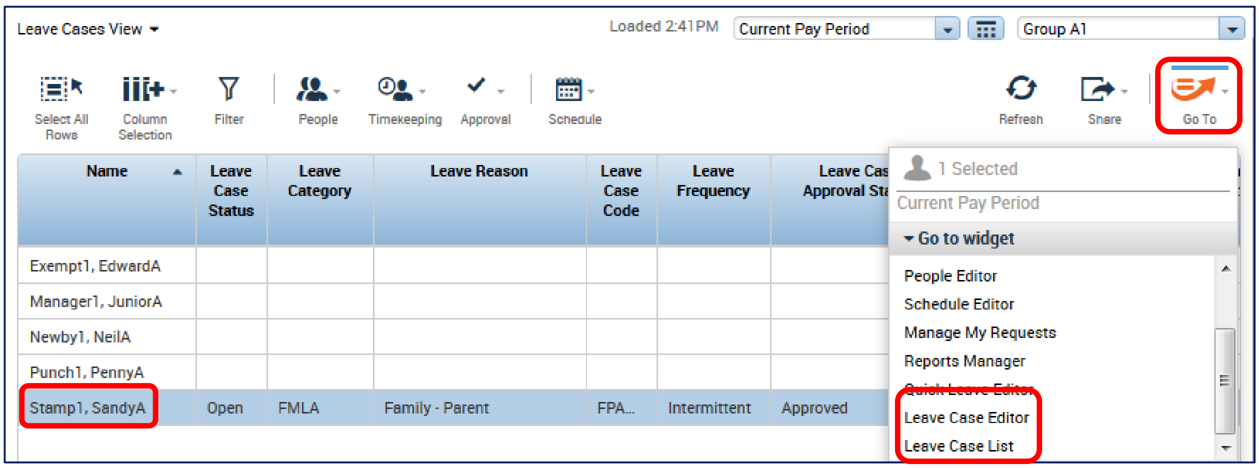
An employee may submit a request for a case, or the Leave Administrator may enter the information for the case.

Exercise

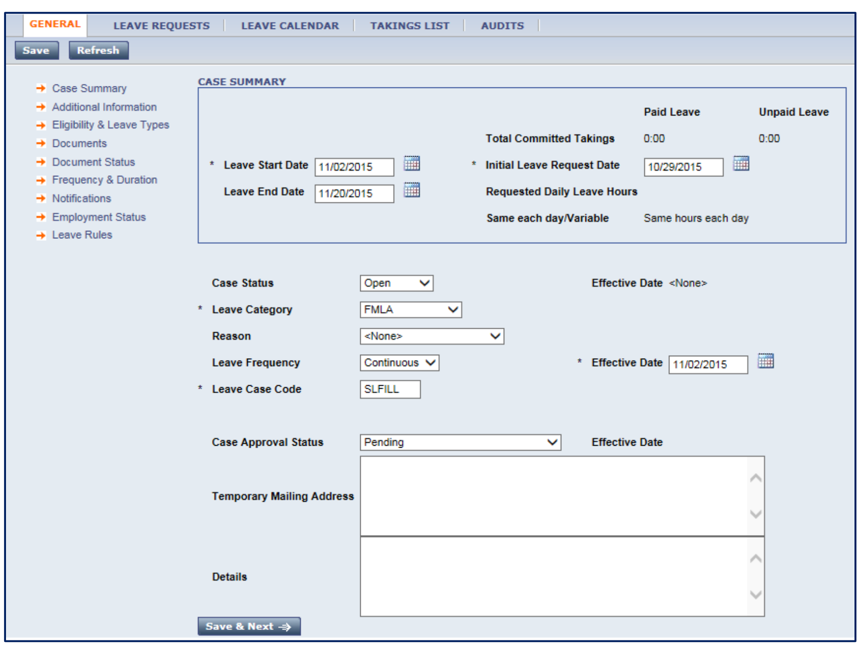
Sandy Stamp has upcoming surgery and will be out for the next three weeks. You will open a continuous case for her.

From the **Leave Cases View,** highlight the case and select **Go To>Leave Case Editor**.

NOTE: The **Leave Case List** selection may also be used. Select the **New** button after the list displays.

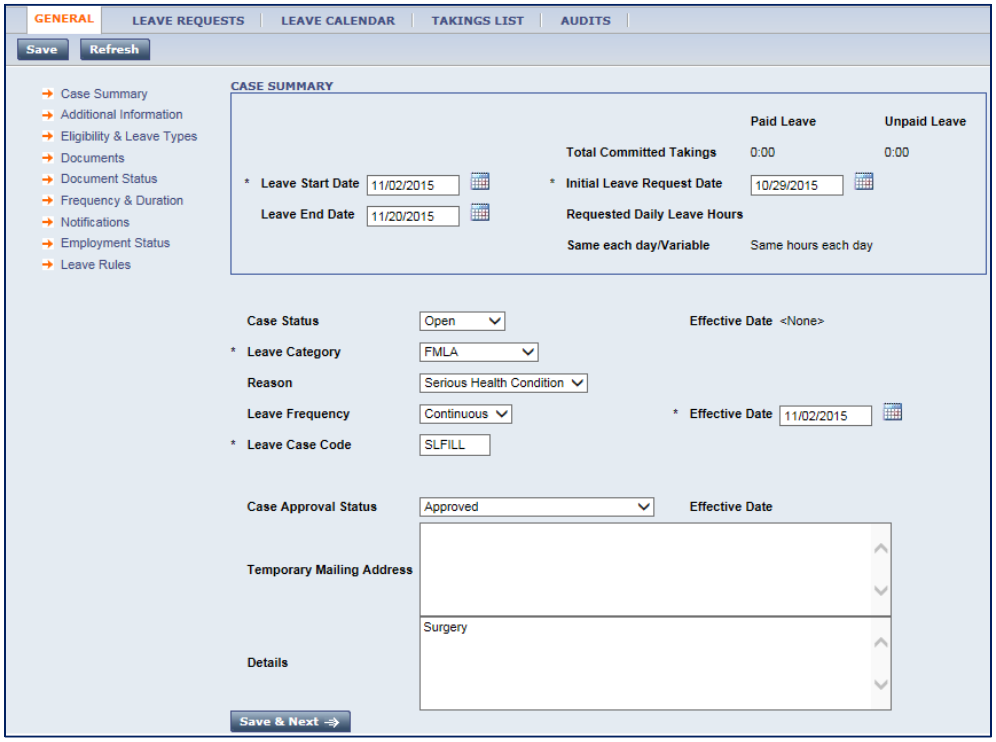


The Leave Case Editor will display, defaulted to the **General**>**Case Summary** page. If the employee submitted the case, the status displays as **Submitted** and no other options are available for edit. Else the options are editable.



NOTE: The **Leave Start Date** is the date the employee is to begin their leave. The **Initial Leave Request Date** is the date the employee gives notification of the leave.

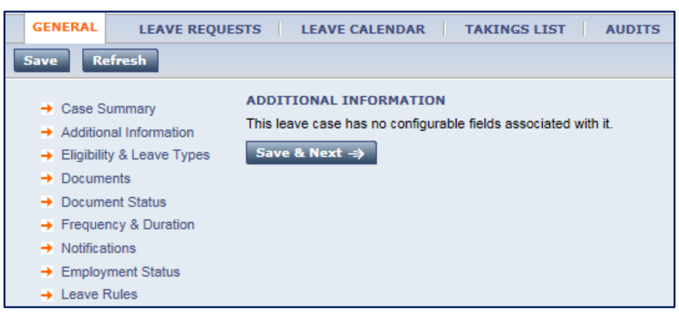
1. Enter any fields denoted with an asterisk. The other fields are optional.



2. Once all fields are updated, select **Save & Next**. This will aid in navigating through the **General** tab of the Leave case.

The **Additional Information** screen below will not be used.

3. Select **Save & Next** to continue.



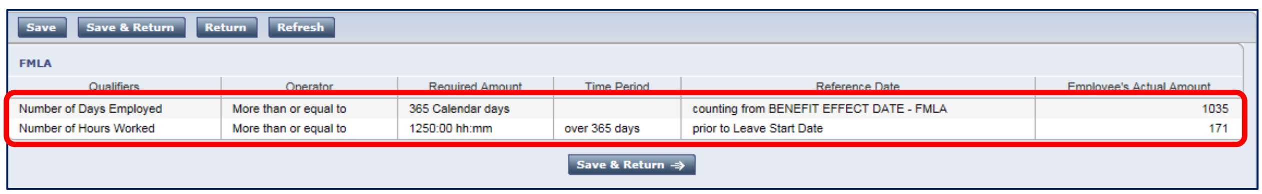
The **Eligibility & Leave Types** screen displays. This screen gives the Leave Administrator the ability to verify the employee's eligibility and their available Leave balances.

NOTE:

- During the first year that an Agency is on eSTART select **Bypass Eligibility Check** since the previous worked hours will not be available in eSTART. If **Check Eligibility** is used during this time, the eligibility check will fail.
- Once the Agency has been using eSTART for 365 days, the **Check Eligibility** feature may be utilized.

Check Eligibility Screen

Below is an example of the information displayed once the Check Eligibility function is available. This function is available after the agency has been using eSTART for one year.



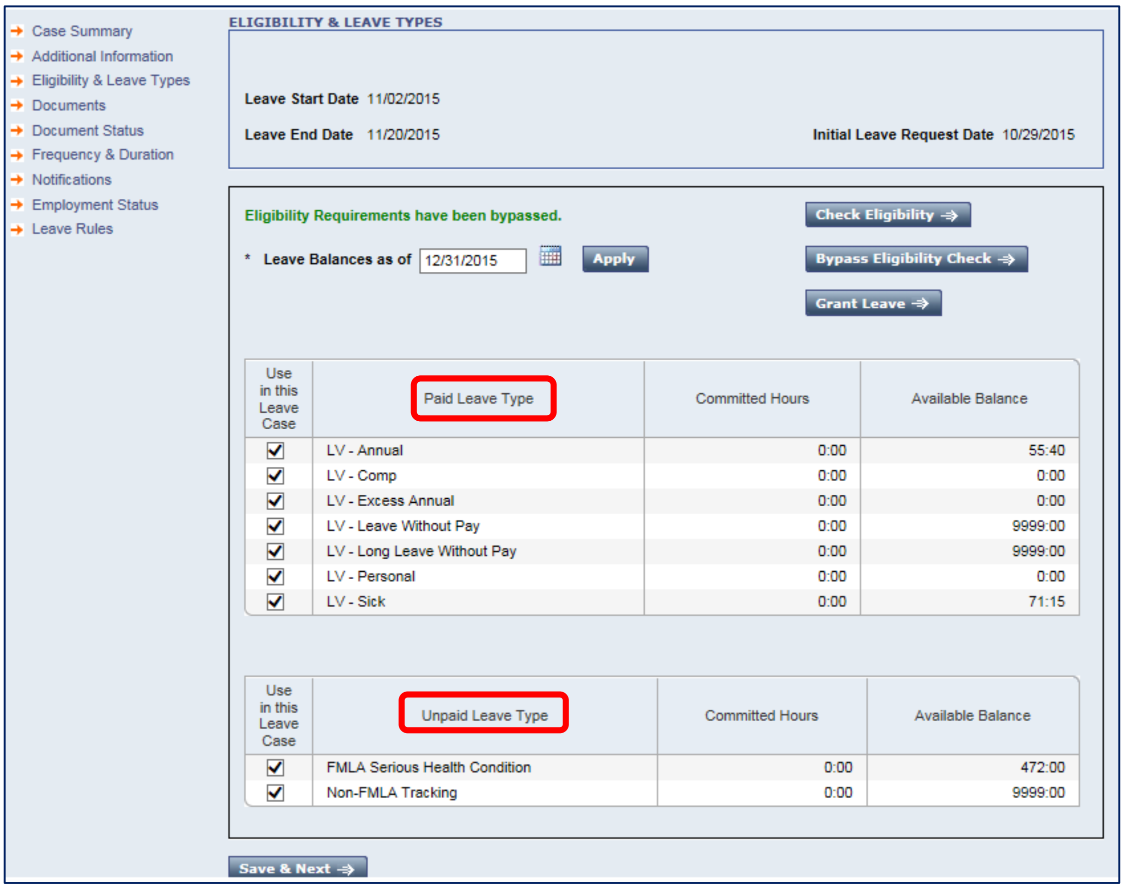
Bypass Eligibility Check Screen

Once the **Bypass Eligibility Check** option is selected, the screen below populates with the Paid and Unpaid Leave types that the employee has available.

This screen allows the user to select the types of leave that the employee chooses to use for their leave case. The check boxes may be unchecked if the specific type of leave will not be used.

NOTE: FMLA cases use leave in a certain order, which is determined by a Leave Cascade, based on the case type. See the **Extended Leave Cascade** job aid for this information. Military Leave does not use a cascade.

Also, the types listed in the **Unpaid Leave Type** section are for tracking purposes only and should remain selected.



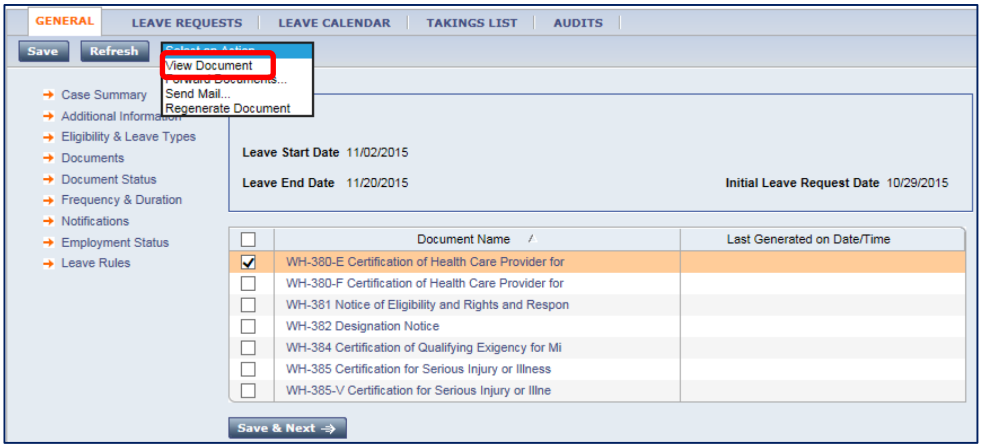
4. Select **Save & Next** to go to the **Documents** screen.

NOTE: See Appendix for specific information about **Long Leave Without Pay, Non-FMLA Long Leave Without Pay** and **Long Military Leave Without Pay** types.

Documents Screen

The **Documents** screen is used to create and view documents that are associated with the Leave case for the employee.

5. Select a document to be generated for the employee.
6. From the **Select an Action** drop-down, select **View Document**.

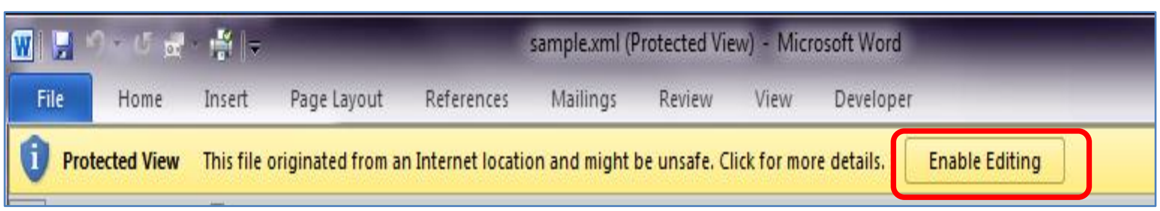


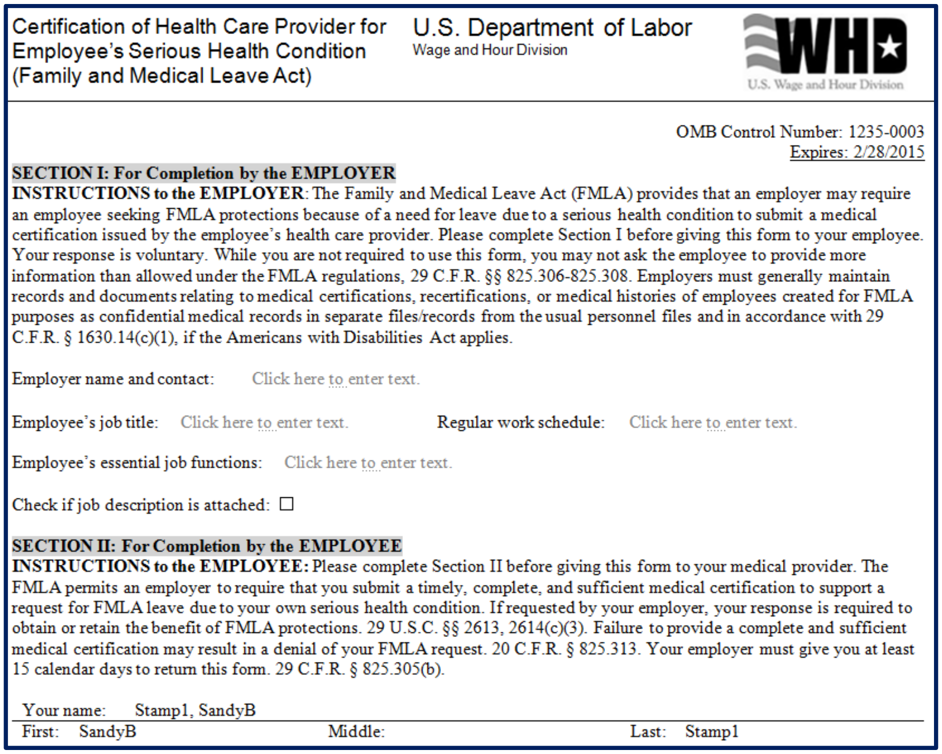
The message below displays at the bottom of the page.

7. Select **Open**.

The selected document opens for viewing and will be populated with the appropriate case information, as in the sample below. It will open in Protected View.

8. Select the **Enable Editing** button in Microsoft Word. This will allow the document to be saved.





Certification of Health Care Provider for Employee's Serious Health Condition (Family and Medical Leave Act)

U.S. Department of Labor
Wage and Hour Division

WHD
U.S. Wage and Hour Division

OMB Control Number: 1235-0003
Expires: 2/28/2015

SECTION I: For Completion by the EMPLOYER
INSTRUCTIONS to the EMPLOYER: The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave due to a serious health condition to submit a medical certification issued by the employee's health care provider. Please complete Section I before giving this form to your employee. Your response is voluntary. While you are not required to use this form, you may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308. Employers must generally maintain records and documents relating to medical certifications, recertifications, or medical histories of employees created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies.

Employer name and contact: Click here to enter text.

Employee's job title: Click here to enter text. Regular work schedule: Click here to enter text.

Employee's essential job functions: Click here to enter text.

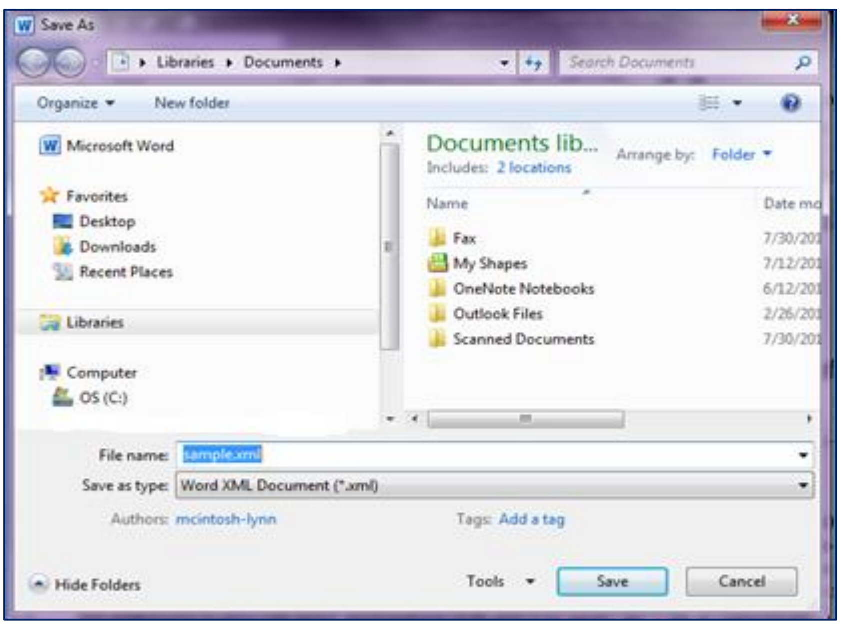
Check if job description is attached: ☐

SECTION II: For Completion by the EMPLOYEE
INSTRUCTIONS to the EMPLOYEE: Please complete Section II before giving this form to your medical provider. The FMLA permits an employer to require that you submit a timely, complete, and sufficient medical certification to support a request for FMLA leave due to your own serious health condition. If requested by your employer, your response is required to obtain or retain the benefit of FMLA protections. 29 U.S.C. §§ 2613, 2614(c)(3). Failure to provide a complete and sufficient medical certification may result in a denial of your FMLA request. 20 C.F.R. § 825.313. Your employer must give you at least 15 calendar days to return this form. 29 C.F.R. § 825.305(b).

Your name: Stamp1, SandyB
First: SandyB Middle: Last: Stamp1

Before sending to the employee, key the applicable data in the fields for each form. Then save the document.

9. Select **File>Save As.** The **Save As** screen displays with the default file name.



10. Save the sample document with a different file name and type.

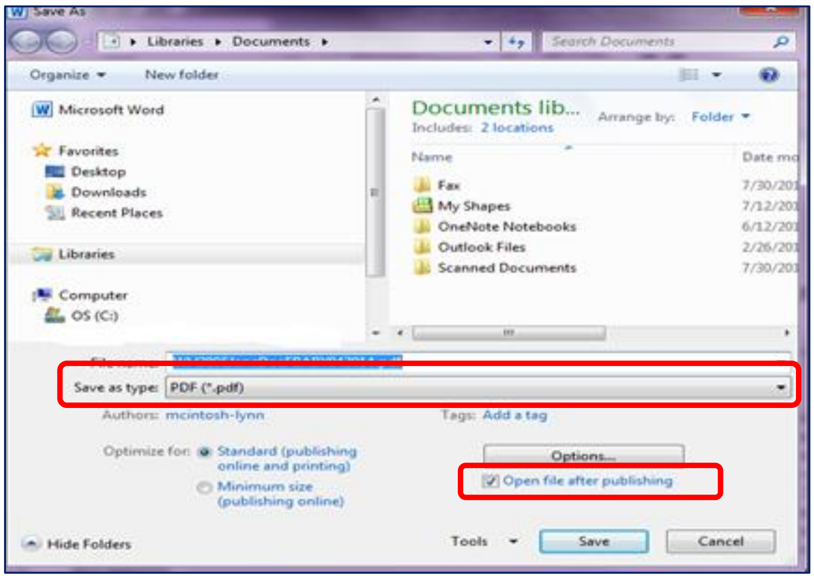
NOTE: The recommended standard for saving these documents is:

- Employee name
- Document name
- Start date of the case

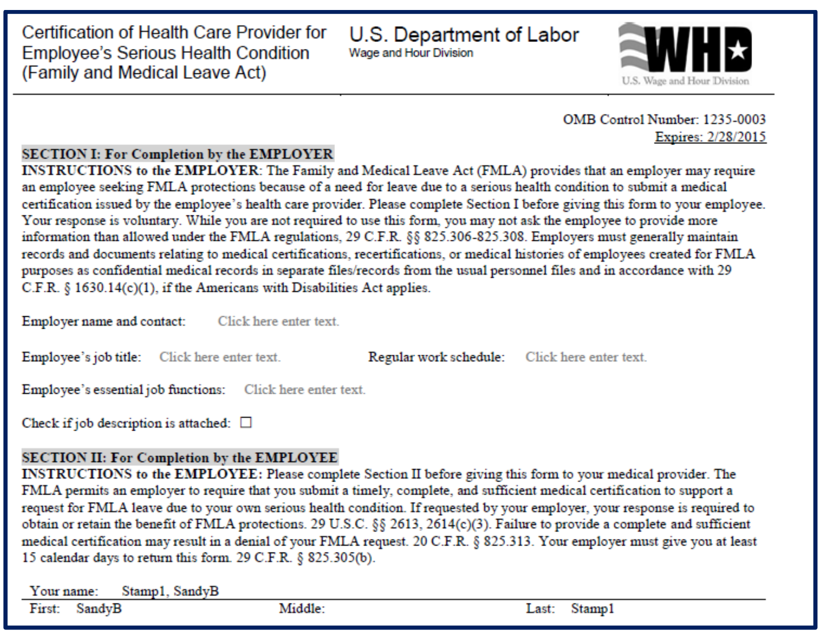
For example: **JohnDoeWH380E043014.pdf**

Change the file name to the standard, as above.

11. From the **Save as** type drop-down, select **PDF (*.pdf)**. Leave the **Open file after publishing** check box selected. Then select **Save**.



The file opens in Adobe Reader.



Certification of Health Care Provider for Employee's Serious Health Condition (Family and Medical Leave Act)

U.S. Department of Labor
Wage and Hour Division

WHD
U.S. Wage and Hour Division

OMB Control Number: 1235-0003
Expires: 2/28/2015

SECTION I: For Completion by the EMPLOYER
INSTRUCTIONS to the EMPLOYER: The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave due to a serious health condition to submit a medical certification issued by the employee's health care provider. Please complete Section I before giving this form to your employee. Your response is voluntary. While you are not required to use this form, you may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308. Employers must generally maintain records and documents relating to medical certifications, recertifications, or medical histories of employees created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies.

Employer name and contact: Click here enter text.

Employee's job title: Click here enter text. Regular work schedule: Click here enter text.

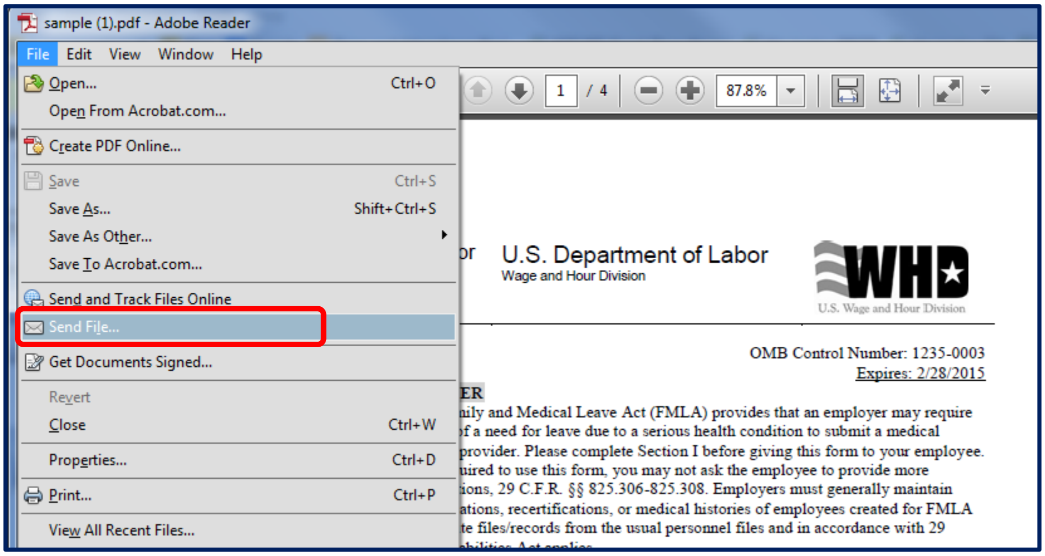
Employee's essential job functions: Click here enter text.

Check if job description is attached: ☐

SECTION II: For Completion by the EMPLOYEE
INSTRUCTIONS to the EMPLOYEE: Please complete Section II before giving this form to your medical provider. The FMLA permits an employer to require that you submit a timely, complete, and sufficient medical certification to support a request for FMLA leave due to your own serious health condition. If requested by your employer, your response is required to obtain or retain the benefit of FMLA protections. 29 U.S.C. §§ 2613, 2614(c)(3). Failure to provide a complete and sufficient medical certification may result in a denial of your FMLA request. 20 C.F.R. § 825.313. Your employer must give you at least 15 calendar days to return this form. 29 C.F.R. § 825.305(b).

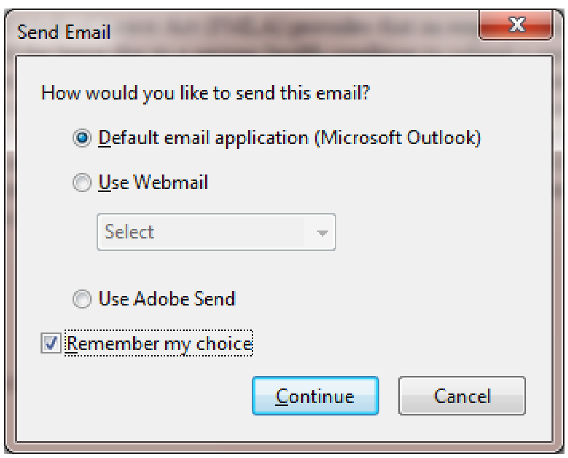
Your name: Stamp1, SandyB
First: SandyB Middle: Last: Stamp1

12. To send the document, select **File>Send File**.



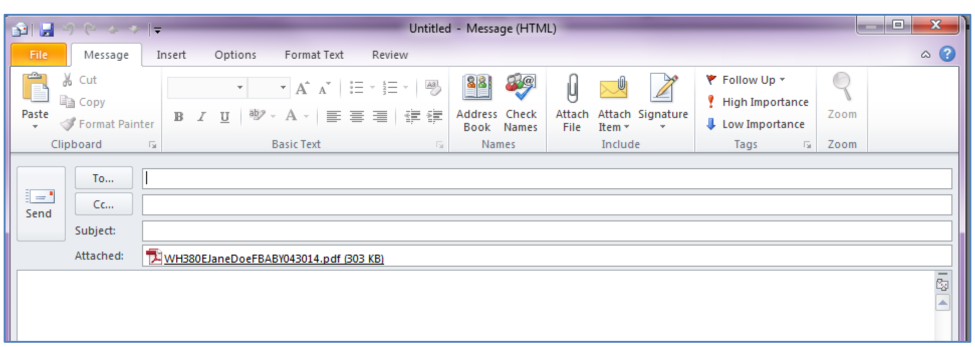
A message may display, as below.

13. If the message below displays, use the default selection and check the **Remember my choice** check box.

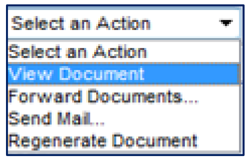


A new email message window opens with the document attached.

14. Complete the remaining information for the email and send to the employee. The employee's manager may also be copied on the email if needed.

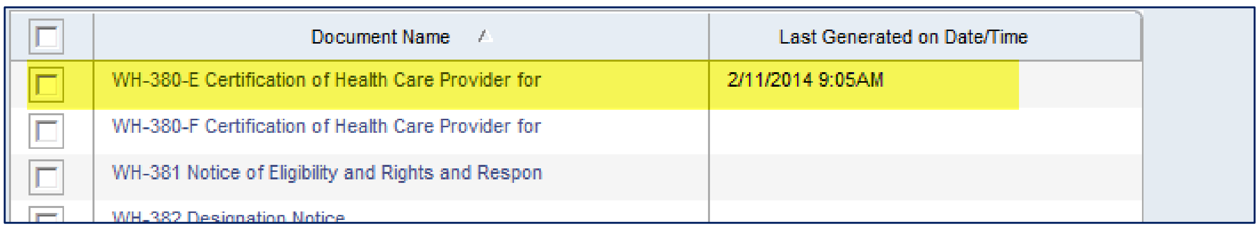


Additional Information about Sending Documents



- **View Document** opens the selected document and allows saving and sending.
- **Forward Document – Do Not Use – this will forward a document link that will not be activated.**
- **Send mail** can be used to send a reminder to the employee's Inbox and/or Agency email for any needed or missing information.
- **Regenerate Document** is referenced in the paragraph below.

Once **View Document** is selected above and the document is viewed/saved, the date and time will populate in the **Last Generated on Date/Time** field, as below. If the document needs to be regenerated for any reason, select **Regenerate Document** from the **Select an Action** drop-down. The document may then be changed and resent to the employee if needed. The **Last Generated on Date/Time** column for the document will be updated.

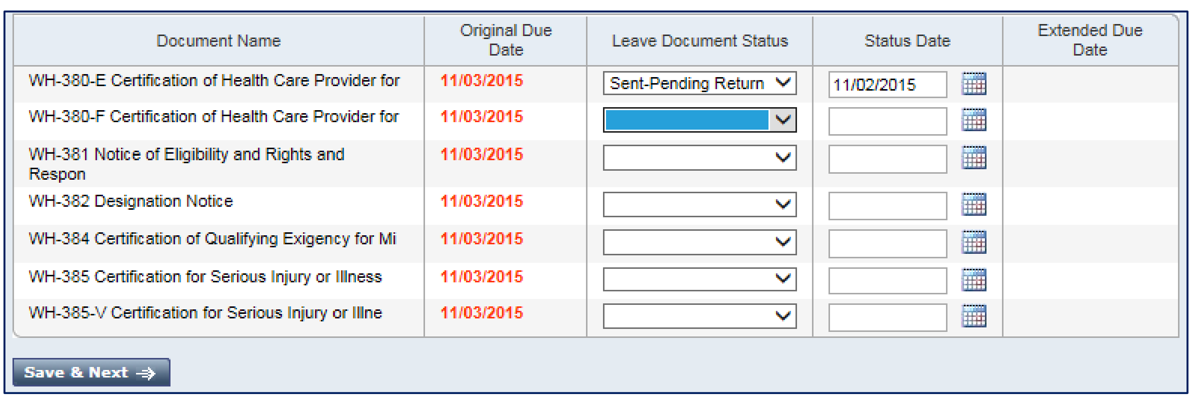


	Document Name	Last Generated on Date/Time
	WH-380-E Certification of Health Care Provider for	2/11/2014 9:05AM
	WH-380-F Certification of Health Care Provider for	
	WH-381 Notice of Eligibility and Rights and Respon	
	WH-382 Designation Notice	

15. Select **Save & Next** to go to the **Document Status** screen.

Document Status Screen

16. Select the appropriate **Leave Document Status** for the documents sent to the employee as well as the status date.

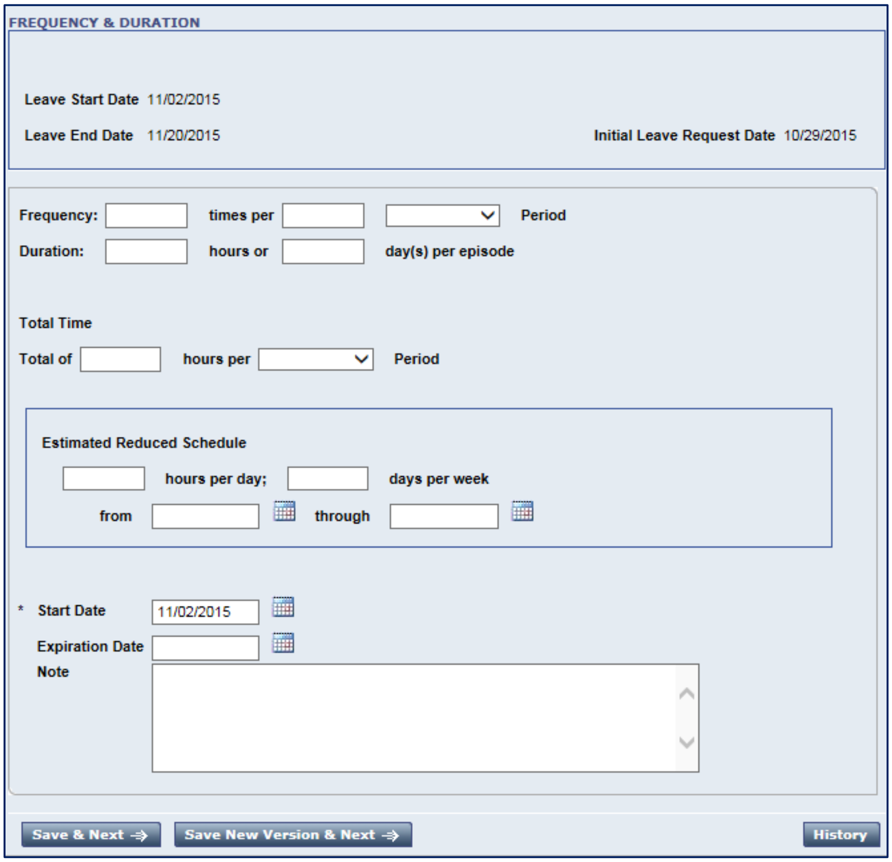


Document Name	Original Due Date	Leave Document Status	Status Date	Extended Due Date
WH-380-E Certification of Health Care Provider for	11/03/2015	Sent-Pending Return	11/02/2015	
WH-380-F Certification of Health Care Provider for	11/03/2015			
WH-381 Notice of Eligibility and Rights and Respon	11/03/2015			
WH-382 Designation Notice	11/03/2015			
WH-384 Certification of Qualifying Exigency for Mi	11/03/2015			
WH-385 Certification for Serious Injury or Illness	11/03/2015			
WH-385-V Certification for Serious Injury or Illne	11/03/2015			

17. Select the **Save & Next** button to go to the **Frequency & Duration** screen.

Frequency & Duration Screen

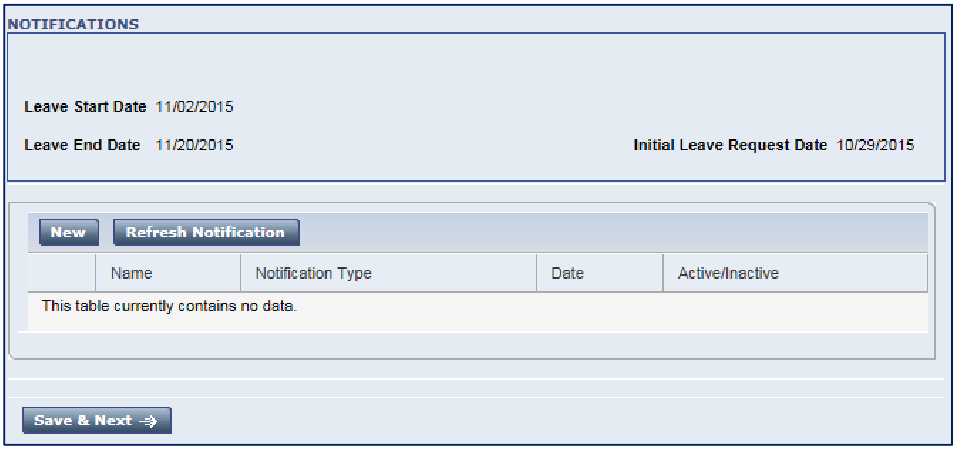
The **Frequency & Duration** screen allows administrators to enter the anticipated frequency and duration of leave episodes in the leave case. This will most commonly be used for intermittent cases.



18. Add any needed information to this screen.
19. Select **Save & Next** to go to the **Notifications** screen.

Notifications Screen

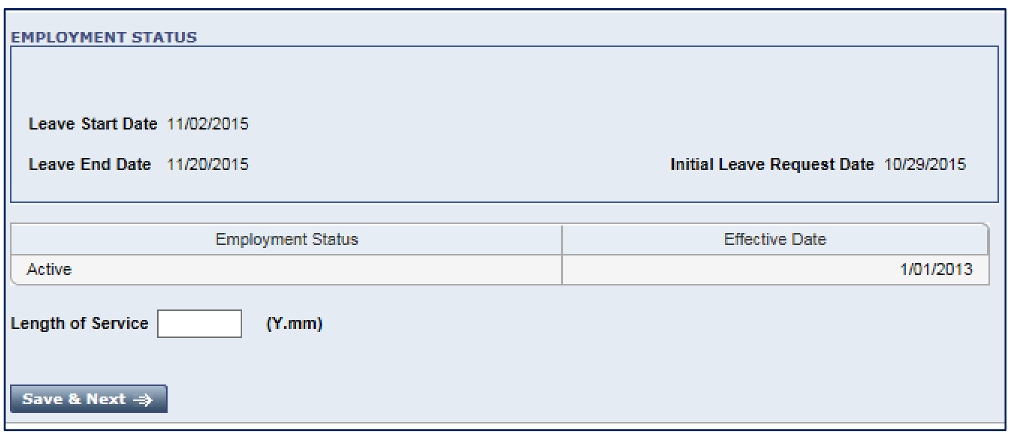
The **Notifications** screen is not currently used.



20. Select the **Save & Next** button to go to the **Employment Status** screen.

Employment Status Screen

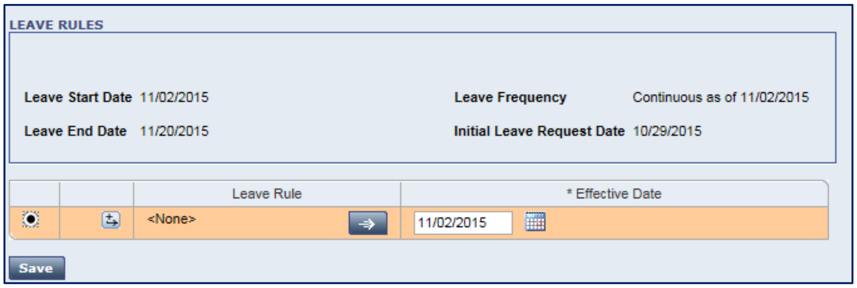
The screen below is informational only. The **Length of Service** may be keyed if desired.



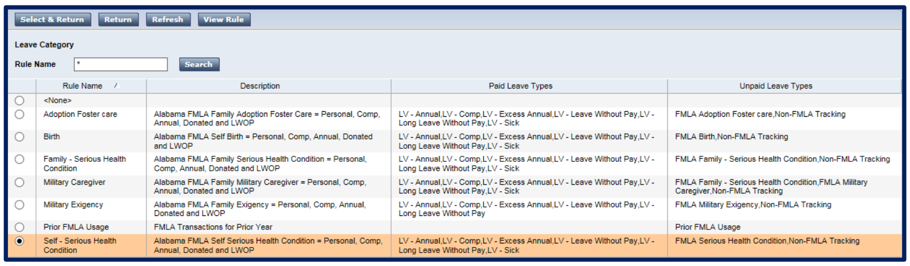
21. Select the **Save & Next** button to go to the **Leave Rules** screen.

Leave Rules Screen

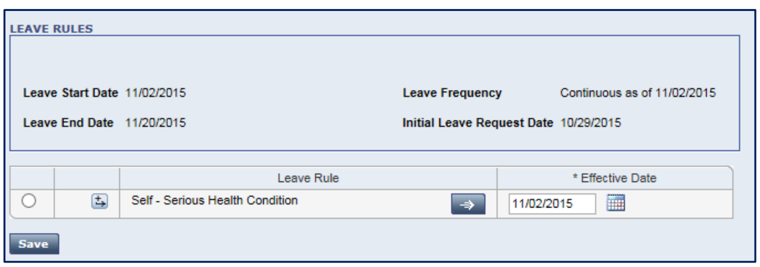
The appropriate leave rule must be selected from the Leave Rule screen.



22. Click on the arrow in the **Leave Rule** column.
23. Once the arrow is selected, the **Select Leave Rule** screen will display.



24. Select the appropriate **Leave Rule** for the case.
25. Click the **Select & Return** button.
26. The leave rule displays on the **Leave Rules** page.
27. **Save** the Leave Rule. At this point the case is now open and active. Time may now be committed to the employee's timecard.



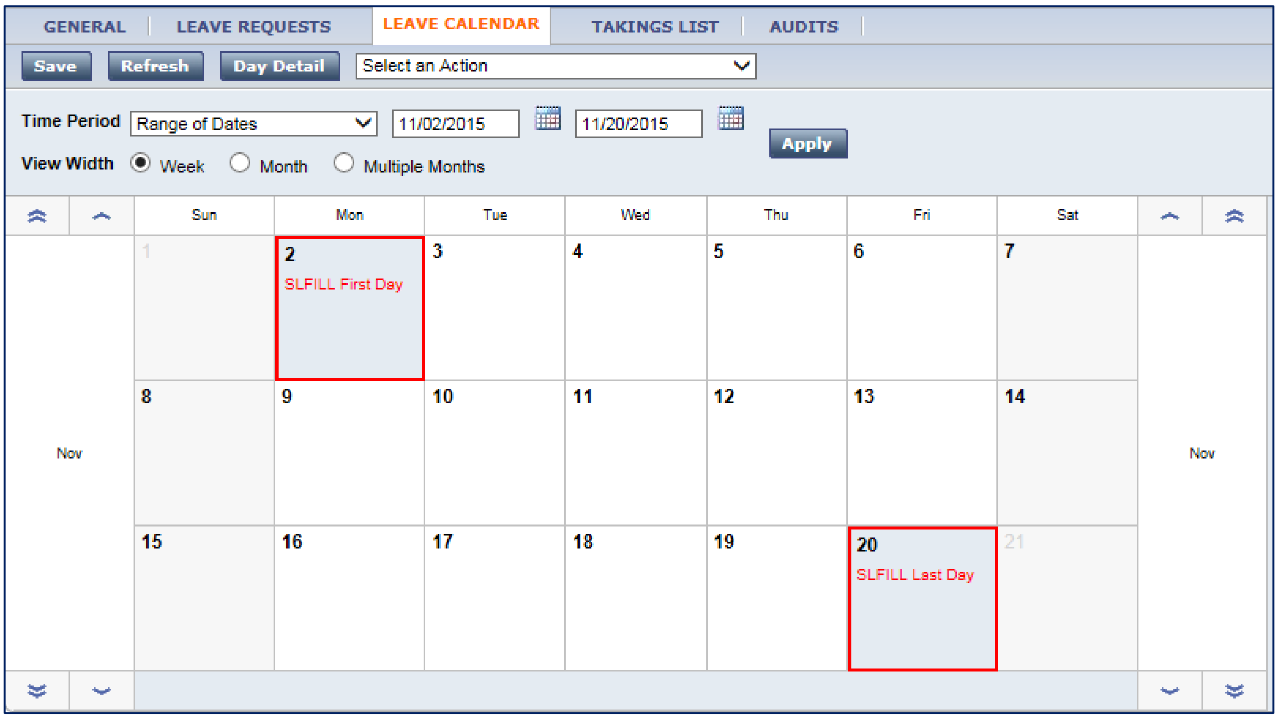
At this point the case has been opened. The next step is to project and commit the time to the employee's timecard.

Projecting and Committing Time from the Leave Calendar

Projecting time from the Leave Calendar

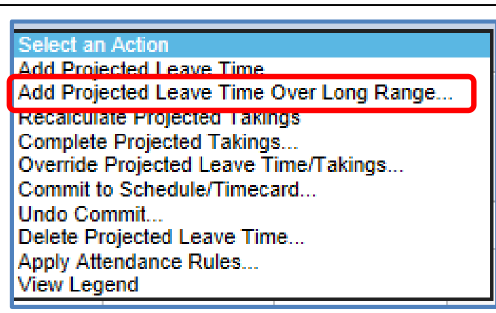
Projecting the time before committing allows the Leave Administrator to see the order the employee's leave will be used. Project the leave time through the end date of the case.

1. Select the **Leave Calendar** tab.
2. When the **Leave Calendar** displays, select or verify the range of dates for the case.

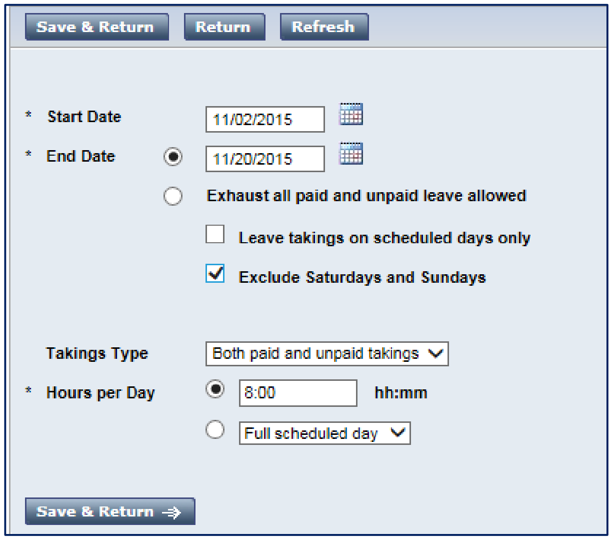


3. Open the **Select an Action** drop-down list to project Leave time.
4. Select **Add Projected Leave Time Over Long Range…** The screen below displays.

> **NOTE:** To add time to a *continuous* Leave case, select **Add Projected Leave Time Over Long Range…**
>
> Or, if the Leave case is *intermittent*, select **Add Projected Leave Time…** instead. This will add leave time to the first day of the case. Any additional hours may be added at a later date, or by the manager through the Leave Case Editor or directly into the employee's timecard.
>
> An employee may also submit a time off request for an open and approved leave case. See the **Employee Pay Codes for Time Off Requests** job aid for this process.

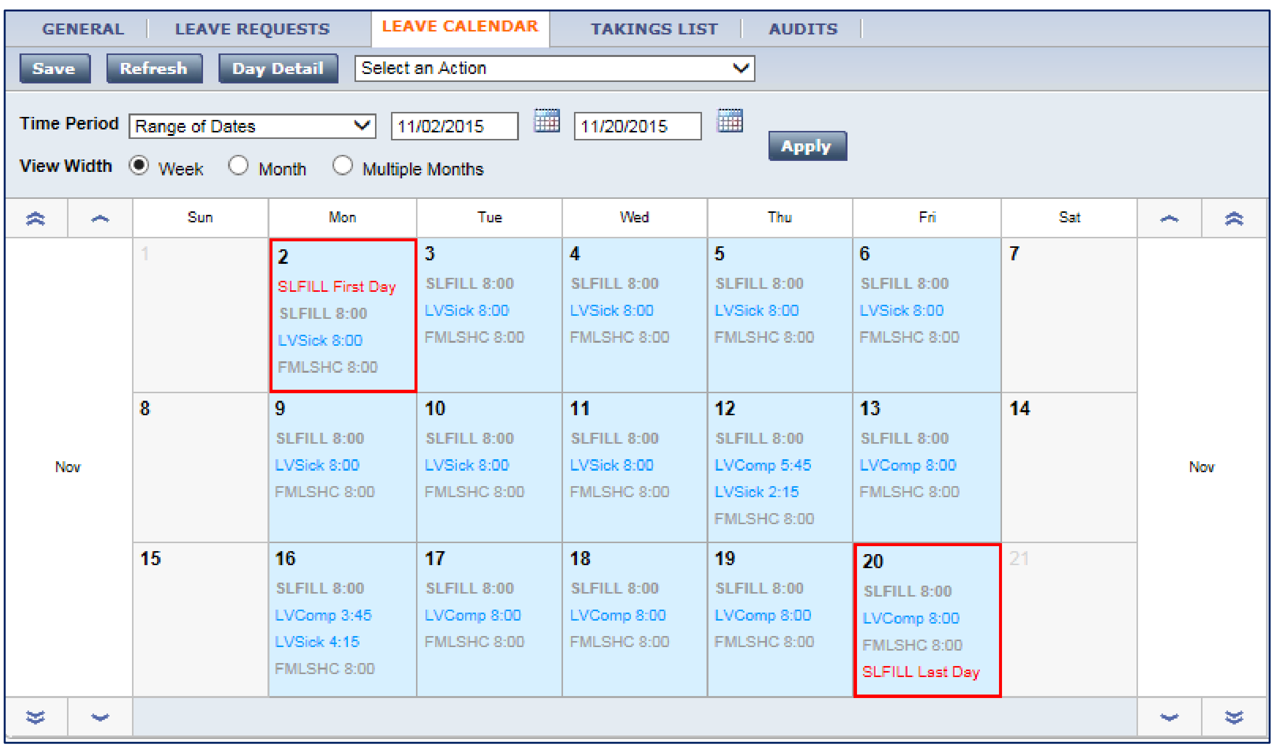


5. Complete the appropriate fields.



6. Select **Save & Return.**

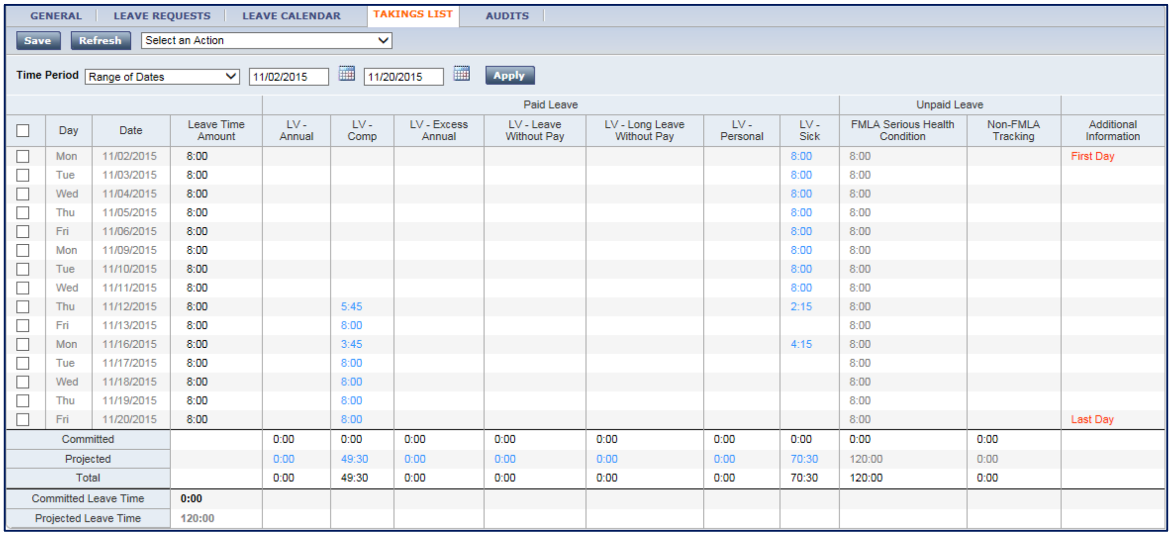
The **Leave Calendar** will be populated with the leave takings. The font will display in light, unbolded colors since the time is "projected" only. Once the time is committed to the Timecard, the font color will display in bold print.



Another way to view the actual leave takings is to select the **Takings List** tab. This screen will provide a better view of the order of the takings.

In the example below, Sick Leave is used first, based on the type of case. Once depleted, the system will use the next available balance, based on the Leave Cascade.

NOTE: See **Extended Leave Cascade** job aid.



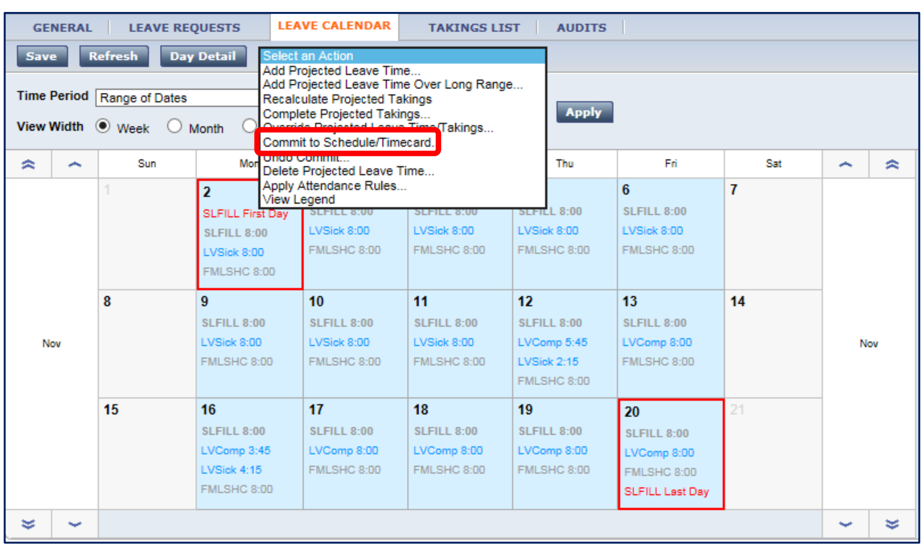
			Paid Leave							Unpaid Leave		
Day	Date	Leave Time Amount	LV - Annual	LV - Comp	LV - Excess Annual	LV - Leave Without Pay	LV - Long Leave Without Pay	LV - Personal	LV - Sick	FMLA Serious Health Condition	Non-FMLA Tracking	Additional Information
Mon	11/02/2015	8:00							8:00	8:00		First Day
Tue	11/03/2015	8:00							8:00	8:00		
Wed	11/04/2015	8:00							8:00	8:00		
Thu	11/05/2015	8:00							8:00	8:00		
Fri	11/06/2015	8:00							8:00	8:00		
Mon	11/09/2015	8:00							8:00	8:00		
Tue	11/10/2015	8:00							8:00	8:00		
Wed	11/11/2015	8:00							8:00	8:00		
Thu	11/12/2015	8:00		5:45					2:15	8:00		
Fri	11/13/2015	8:00		8:00						8:00		
Mon	11/16/2015	8:00		3:45					4:15	8:00		
Tue	11/17/2015	8:00		8:00						8:00		
Wed	11/18/2015	8:00		8:00						8:00		
Thu	11/19/2015	8:00		8:00						8:00		
Fri	11/20/2015	8:00		8:00						8:00		Last Day
Committed			0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	
Projected			0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Total			0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Committed Leave Time		0:00										
Projected Leave Time		120:00										

7. If the leave takings are correct, the time may now be committed to the timecard.

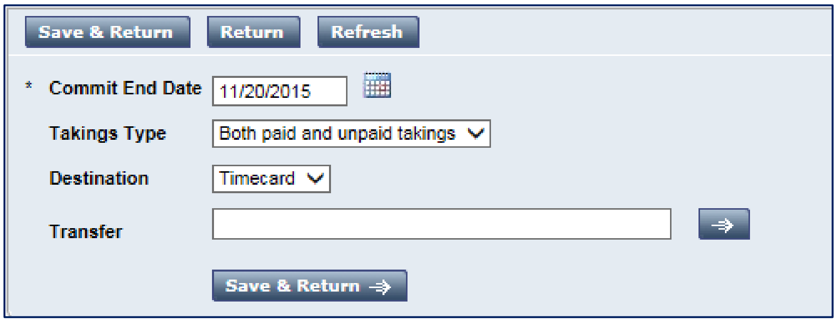
Committing Time for a Continuous Case

Commiting the time allows the Leave Administrator to add time for the leave case to the employee's timecard. Commit the leave time through then end of the **next pay period or the first holiday**, whichever comes first. If desired, the pay codes for the leave may be added directly into the timecard. However, this method ensures the time is used in the order projected.

8. Return to the **Leave Calendar** tab.
9. Click the **End Date** to which time is to be committed in calendar.
10. Select **Commit to Schedule/Timecard…**from the **Select an Action** drop-down.

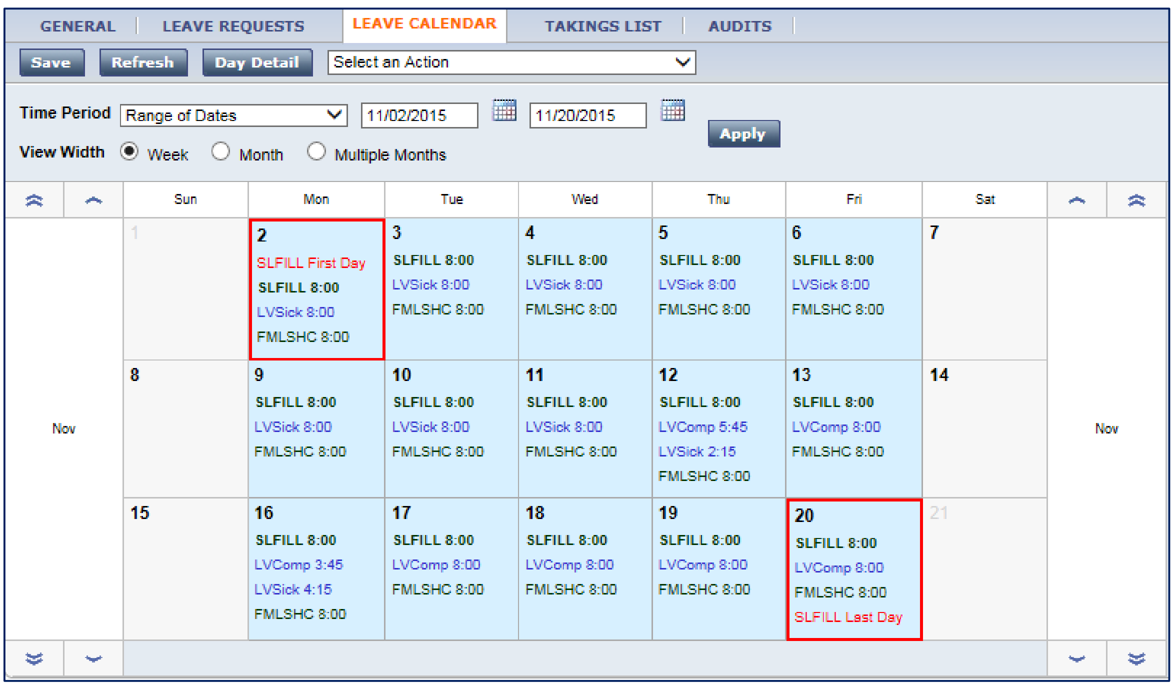


The screen below displays.

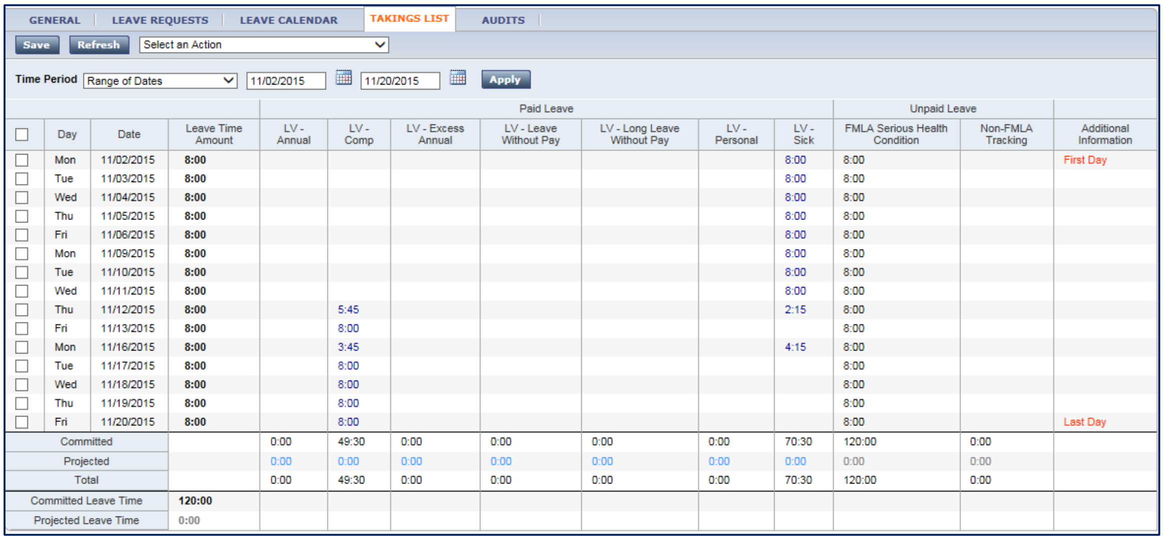


11. Verify or select the end date for the committed time and complete the appropriate fields.
12. Select **Save & Return**.

Leave Calendar view of the same dates. The font displays in dark, bold colors now that the time has been committed to the timecard.

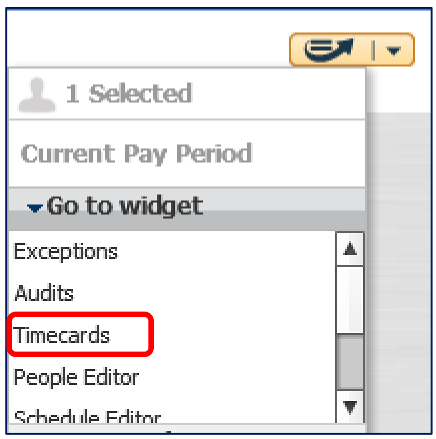


To view the order of the takings, select the **Takings List** tab. Notice that the committed days are darker than the projected days in the screen shot below.



				Paid Leave							Unpaid Leave		
	Day	Date	Leave Time Amount	LV - Annual	LV - Comp	LV - Excess Annual	LV - Leave Without Pay	LV - Long Leave Without Pay	LV - Personal	LV - Sick	FMLA Serious Health Condition	Non-FMLA Tracking	Additional Information
	Mon	11/02/2015	8:00							8:00	8:00		First Day
	Tue	11/03/2015	8:00							8:00	8:00		
	Wed	11/04/2015	8:00							8:00	8:00		
	Thu	11/05/2015	8:00							8:00	8:00		
	Fri	11/06/2015	8:00							8:00	8:00		
	Mon	11/09/2015	8:00							8:00	8:00		
	Tue	11/10/2015	8:00							8:00	8:00		
	Wed	11/11/2015	8:00							8:00	8:00		
	Thu	11/12/2015	8:00		5:45					2:15	8:00		
	Fri	11/13/2015	8:00		8:00						8:00		
	Mon	11/16/2015	8:00		3:45					4:15	8:00		
	Tue	11/17/2015	8:00		8:00						8:00		
	Wed	11/18/2015	8:00		8:00						8:00		
	Thu	11/19/2015	8:00		8:00						8:00		
	Fri	11/20/2015	8:00		8:00						8:00		Last Day
Committed				0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Projected				0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	
Total				0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Committed Leave Time			120:00										
Projected Leave Time			0:00										

13. Select the **Go To** link and select **Timecards** to verify the committed dates.



Timecard for the pay period displays.

Mon 3/07	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	8:00
Tue 3/08	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	16:00
Wed 3/09	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	24:00
Thu 3/10	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	32:00
Fri 3/11	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	40:00
Sat 3/12								40:00
Sun 3/13								40:00
Mon 3/14	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	48:00
Tue 3/15	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	56:00

Best Business Practice

The best practice is to:

- **Add Projected Time Over Long Range** to the end of the case.
- **Commit** the time through the end of the **next pay period or the first Holiday**, whichever comes first.

Removing Time Committed on a Holiday

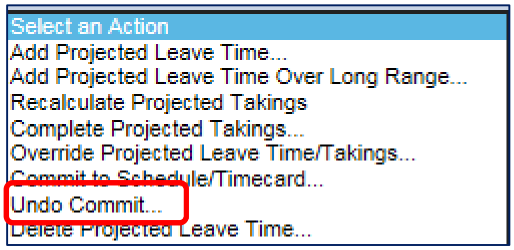
If the time was projected for a long range that included a Holiday, it can be easily corrected. In this example, a few extra steps are needed in order for this time to show correctly in the timecard.

+	×	Wed 11/11	LV - FMLA TRACKING	8:00
+	×		LV - SICK LEAVE TAKEN	8:00
+	×		Veterans Day	8:00

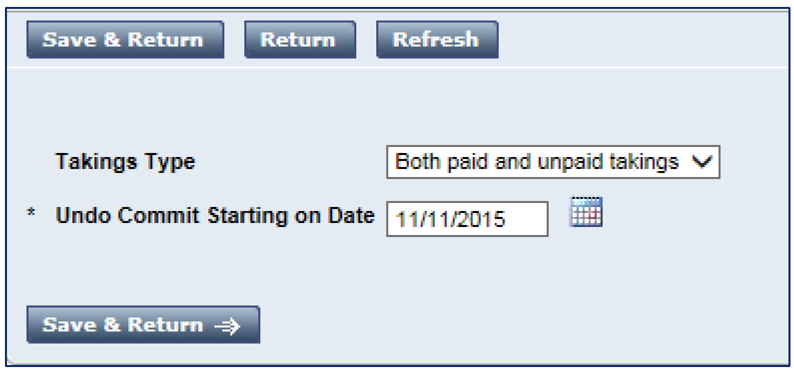
1. In order to correct this, navigate back to the Leave Case Editor.
2. Click on the **Leave Calendar** tab.
3. Click on the **Holiday Date(s)** to select**.**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 SLFILL First Day SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	3 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	4 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	5 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	6 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	7
8	9 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	10 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	11 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	12 SLFILL 8:00 LVComp 5:45 LVSick 2:15 FMLSHC 8:00	13 SLFILL 8:00 LVComp 8:00 FMLSHC 8:00	14
15	16 SLFILL 8:00 LVComp 3:45 LVSick 4:15 FMLSHC 8:00	17 SLFILL 8:00 LVComp 8:00 FMLSHC 8:00	18 SLFILL 8:00 LVComp 8:00 FMLSHC 8:00	19 SLFILL 8:00 LVComp 8:00 FMLSHC 8:00	20 SLFILL 8:00 LVComp 8:00 FMLSHC 8:00 SLFILL Last Day	21

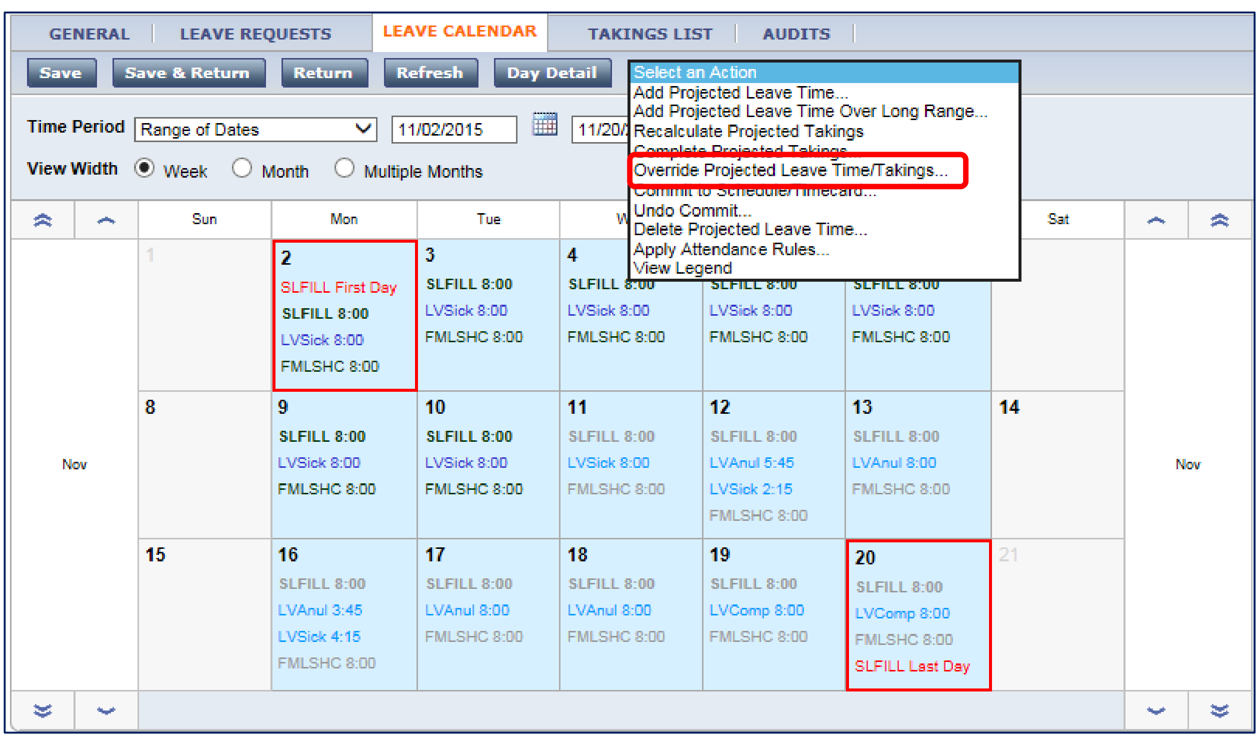
4. Select **Undo Commit** from the **Select an Action** drop-down**.**



5. Verify the date and edit if needed.
6. Then select **Save & Return** from the screen below.

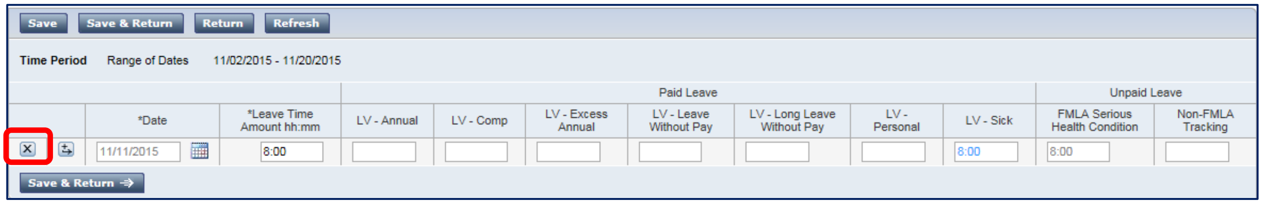


7. Once the time is no longer committed, select the date on the calendar again. Select **Override Projected Leave Time/Takings** from the **Select an Action** drop-down.

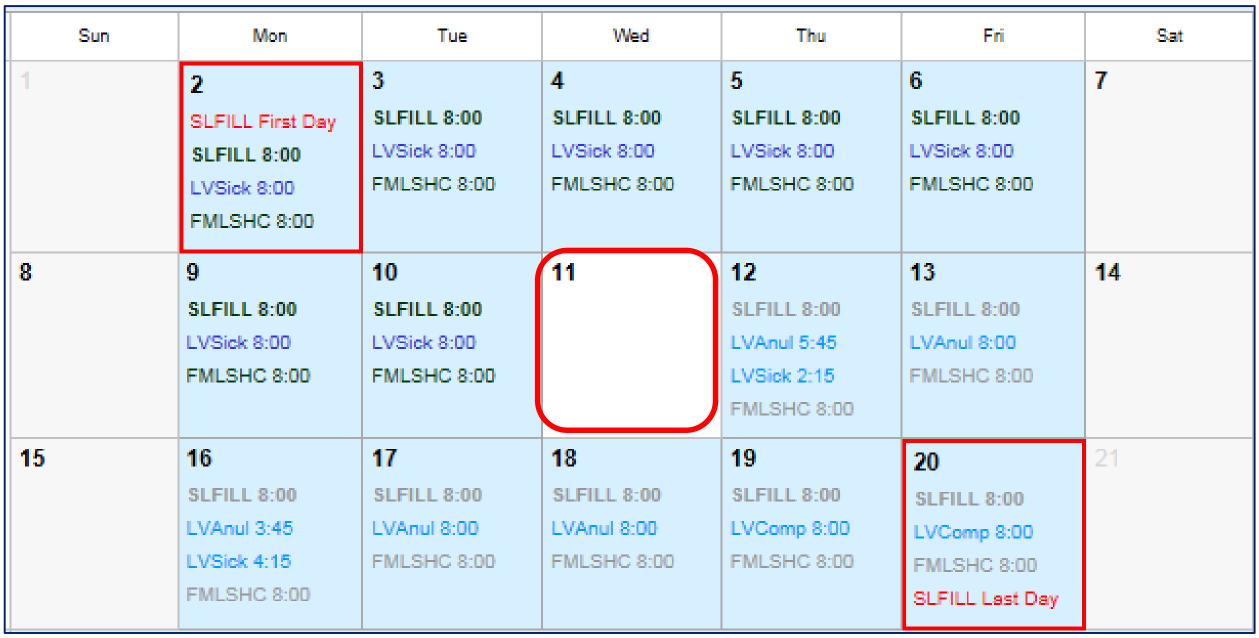


8. The **Override Projected Leave Time/Takings** screen will display as below. Delete the amount from any field where one is present or click the **X** on the far left of the row to remove all takings for that date.

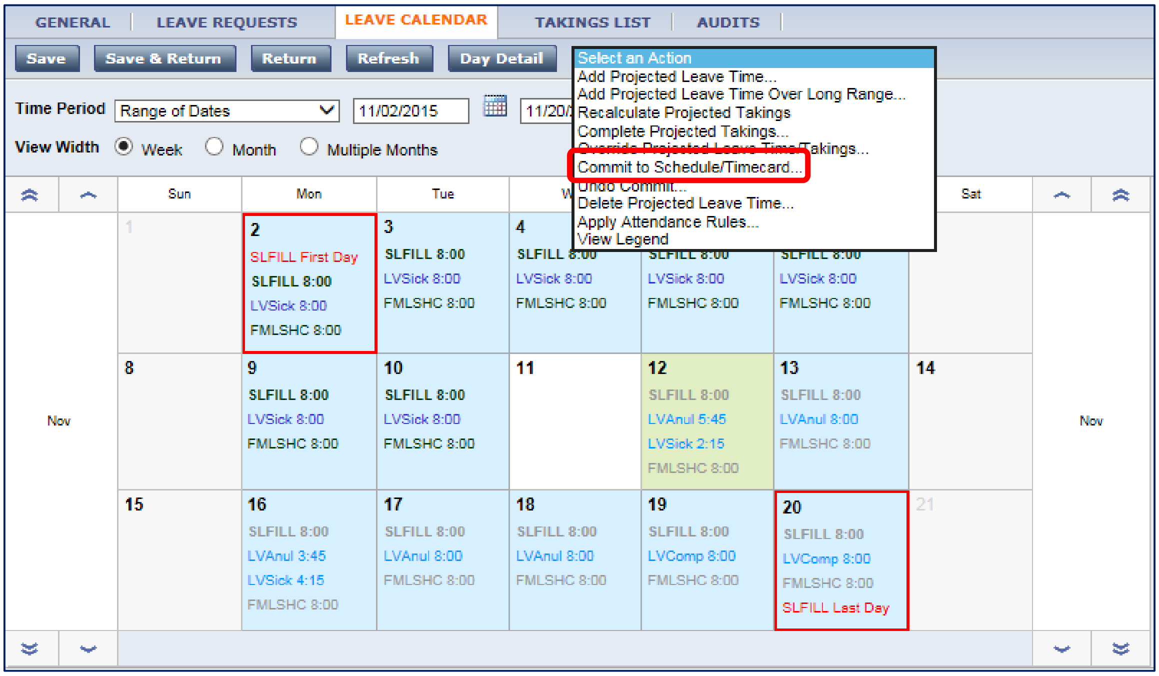
9. Then select **Save & Return**.



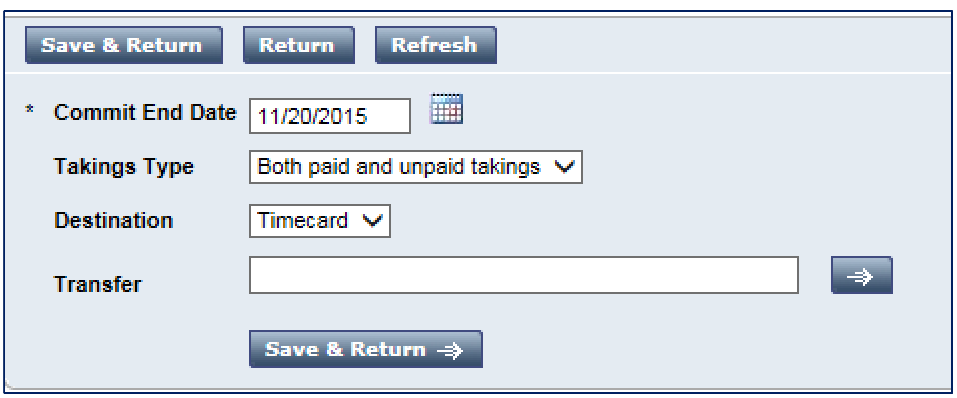
The **Leave Calendar** now displays the 11th correctly.



10. The time will now need to be re-committed to the timecard, starting on the day following the holiday, in order to display correctly.



11. Select the **End Date** to which time is to be commited.
12. Select **Commit to Schedule/Timecard** from the **Select an Action** drop-down. The screen below displays.



13. Enter the **Commit End Date.** Verify the information on the screen.
14. Select **Save & Return**.

15. Verify the committed time on the calendar.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 SLFILL First Day SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	3 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	4 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	5 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	6 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	7
8	9 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	10 SLFILL 8:00 LVSick 8:00 FMLSHC 8:00	11	12 SLFILL 8:00 LVAnul 5:45 LVSick 2:15 FMLSHC 8:00	13 SLFILL 8:00 LVAnul 8:00 FMLSHC 8:00	14
15	16 SLFILL 8:00 LVAnul 3:45 LVSick 4:15 FMLSHC 8:00	17 SLFILL 8:00 LVAnul 8:00 FMLSHC 8:00	18 SLFILL 8:00 LVAnul 8:00 FMLSHC 8:00	19 SLFILL 8:00 LVComp 8:00 FMLSHC 8:00	20 SLFILL 8:00 LVComp 8:00 FMLSHC 8:00 SLFILL Last Day	21

View the employee timecard to verify that the Holiday is displaying correctly and no longer has committed leave time for that day.

Date	Pay Code	Amount	In	Transfer	Out	Shift	Daily	Period
Mon 11/09	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	8:00
Tue 11/10	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	16:00
Wed 11/11	Veterans Day	8:00					8:00	24:00
Thu 11/12	LV - ANNUAL LEAVE TAK...	5:45						
	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	2:15					8:00	32:00
Fri 11/13	LV - ANNUAL LEAVE TAK...	8:00						
	LV - FMLA TRACKING	8:00					8:00	40:00

Other Types of Leave Cases

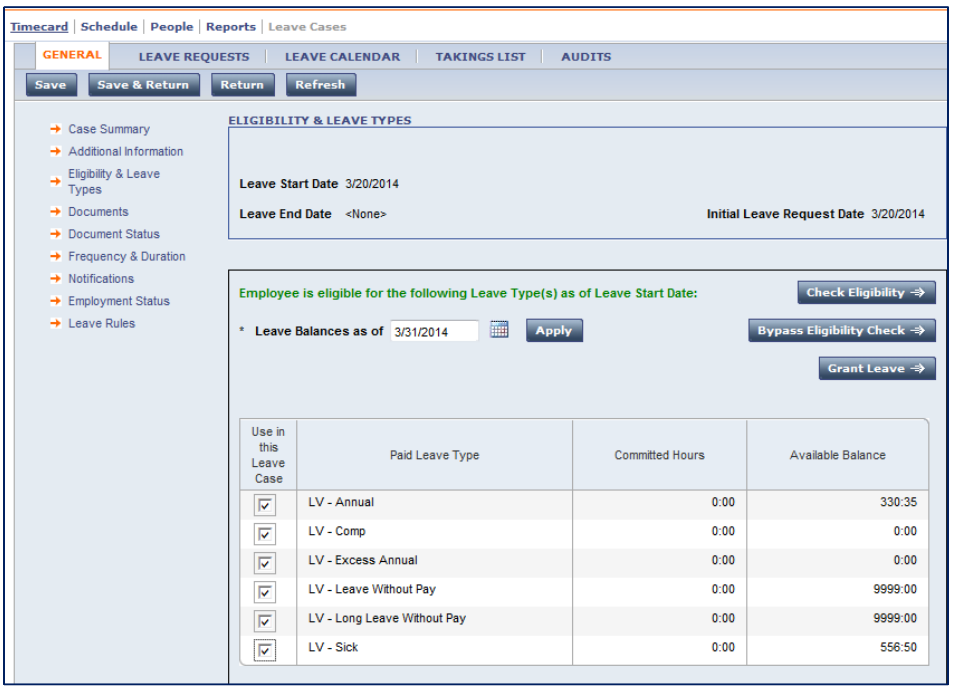
Purpose

The information below pertains to other types of leave cases that may be needed.

<u>FMLA Long Leave Without Pay</u>

Using the Leave Cascade

To use the Leave Cascade, the **Paid Leave Types** should remain selected.

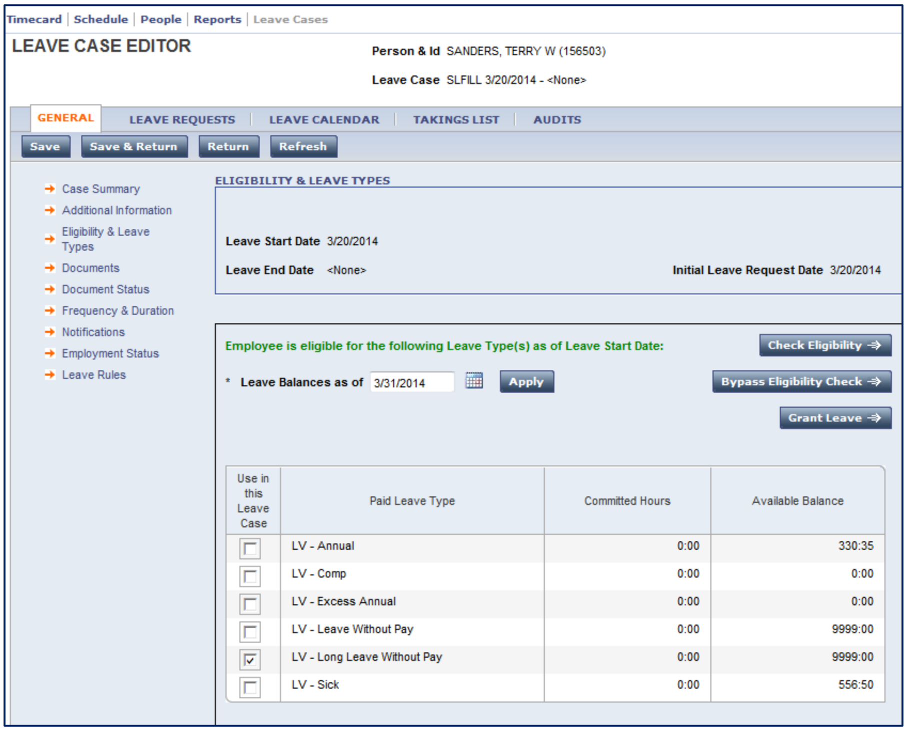


NOTE: If **LV – Long Leave Without Pay** is selected **with** other leave types that **have a balance**, only the <u>other types</u> will be used. That is **LV-Long Leave Without Pay** will **NOT** be used.

But, if **LV – Long Leave Without Pay** is selected **with** other leave types that **DO NOT** have a balance, only **LV – Long Leave Without Pay** will be used.

Long Leave Without Pay

In order to use **LV-Long Leave Without Pay**, all other **Paid Leave Types** must be **unchecked.** That is, uncheck all “Paid Leave Types” EXCEPT **LV-Long Leave Without Pay.**



NOTE: If **LV – Long Leave Without Pay** is selected **with** other leave types that **have a balance**, only the <u>other types</u> will be used. Since **LV-Long Leave Without Pay** will **NOT** be used, it should be unchecked.

But, if **LV – Long Leave Without Pay** is selected **with** other leave types that **DO NOT** have a balance, then only **LV – Long Leave Without Pay** will be used.

Non-FMLA Long Leave Without Pay

If an employee has been on leave without pay that is not related to an FMLA case for 19 consecutive days, there is no leave case to be opened in eSTART. From the employee’s timecard, select the **ULLWP-Tracking** pay code for tracking purposes only.

Military Leave

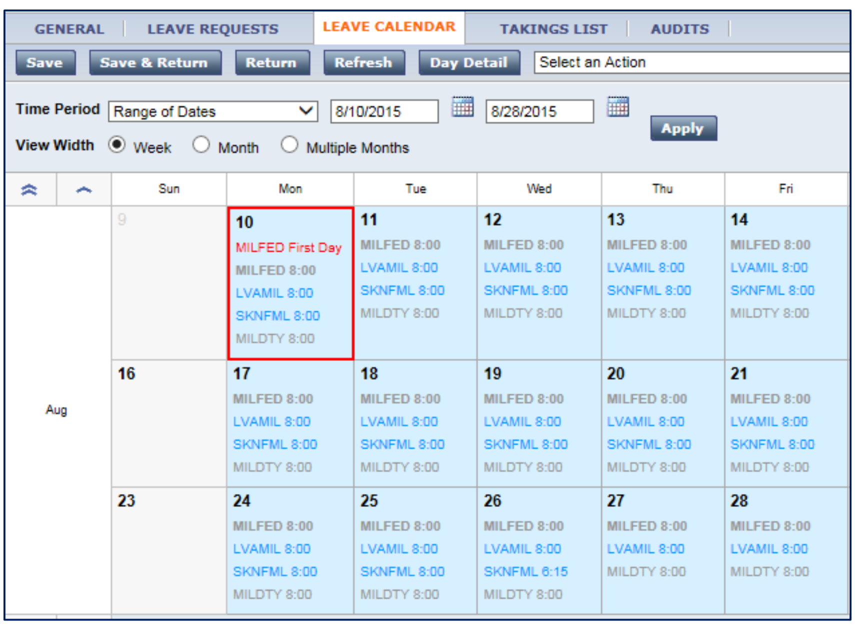
Military Leave does not cascade through the leave types. Since all paid leave types are selected by default, any that are not to be used **must be unselected**.

NOTE: If more than one paid leave type remains selected, ALL selected types will be used. That is, the employee will be erroneously charged time from each selected type.

For example, two paid types are selected in the screen shot below.

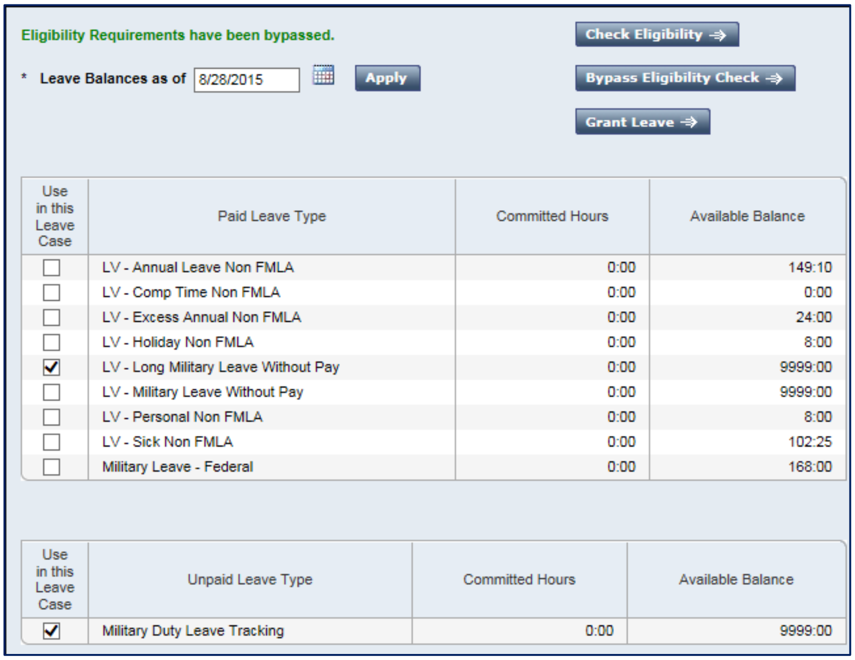
Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☑	LV - Annual Leave Non FMLA	0:00	142:40
☐	LV - Comp Time Non FMLA	0:00	0:00
☐	LV - Excess Annual Non FMLA	0:00	24:00
☐	LV - Holiday Non FMLA	0:00	8:00
☐	LV - Long Military Leave Without Pay	0:00	9999:00
☐	LV - Military Leave Without Pay	0:00	9999:00
☐	LV - Personal Non FMLA	0:00	8:00
☑	LV - Sick Non FMLA	0:00	98:05
☐	Military Leave - Federal	0:00	168:00

The result of selecting two paid leave type codes above is that **all selected types will be charged**. In the screen shot below, the codes in blue text indicate the time that will be charged from each type. **This employee would be charged twice in error.**



	Sun	Mon	Tue	Wed	Thu	Fri
Aug	9	10 MILFED First Day MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	11 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	12 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	13 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	14 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00
	16	17 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	18 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	19 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	20 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	21 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00
	23	24 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	25 MILFED 8:00 LVAMIL 8:00 SKNFML 8:00 MILDTY 8:00	26 MILFED 8:00 LVAMIL 8:00 SKNFML 6:15 MILDTY 8:00	27 MILFED 8:00 LVAMIL 8:00 MILDTY 8:00	28 MILFED 8:00 LVAMIL 8:00 MILDTY 8:00

The correct way to do this is to use only one type. In the following example, **LV-Long Military Leave Without Pay** will be used. All other paid leave types must be unchecked. The **Military Duty Leave Tracking** code is an unpaid leave type and must remain selected. For each military case, one paid leave type and one unpaid leave type must be selected.

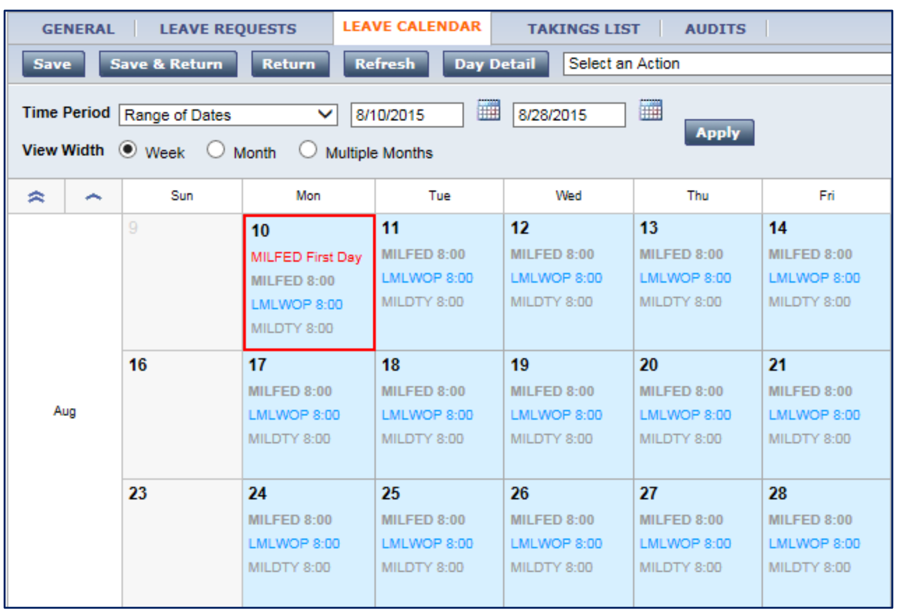


Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☐	LV - Annual Leave Non FMLA	0:00	149:10
☐	LV - Comp Time Non FMLA	0:00	0:00
☐	LV - Excess Annual Non FMLA	0:00	24:00
☐	LV - Holiday Non FMLA	0:00	8:00
☑	LV - Long Military Leave Without Pay	0:00	9999:00
☐	LV - Military Leave Without Pay	0:00	9999:00
☐	LV - Personal Non FMLA	0:00	8:00
☐	LV - Sick Non FMLA	0:00	102:25
☐	Military Leave - Federal	0:00	168:00

Use in this Leave Case	Unpaid Leave Type	Committed Hours	Available Balance
☑	Military Duty Leave Tracking	0:00	9999:00

Once takings have been projected, the calendar displays with leave time charged only to one paid leave type. This is correct. The time can now be committed to the timecard.

NOTE: If any projected, uncommitted time is in the calendar when a leave type is changed, the projected, uncommitted time **will be changed** to the new leave type. Committed time will not be changed.



	Sun	Mon	Tue	Wed	Thu	Fri
Aug	9	10 MILFED First Day MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	11 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	12 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	13 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	14 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00
	16	17 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	18 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	19 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	20 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	21 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00
	23	24 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	25 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	26 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	27 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00	28 MILFED 8:00 LMLWOP 8:00 MILDTY 8:00

Generating Leave Reports

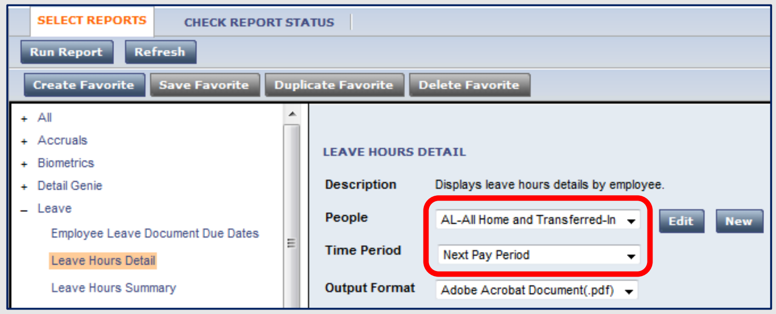
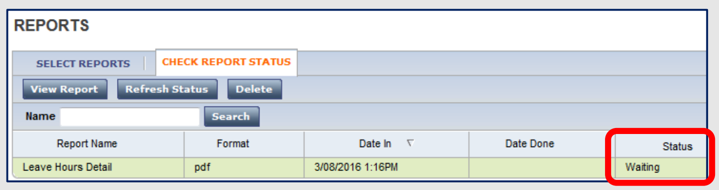
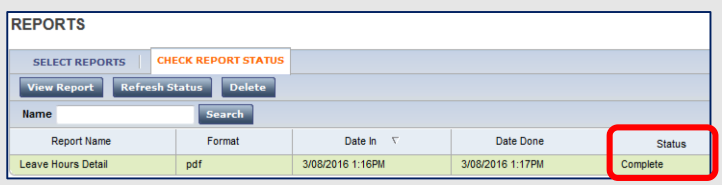
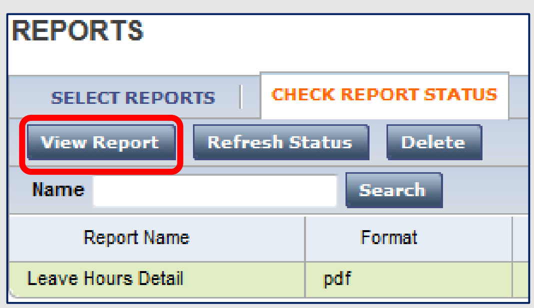
Purpose

Employee leave information is available in several different leave reports. You can generate leave reports on a daily, weekly, or pay-period basis, or any time you need information to accomplish your business tasks. For example, you can run the **Leave Hours Detail** report to review the types of leave hours for each shift that has been committed to an employee's timecard.

Example

You want to review Sandy Stamp's leave hours for each shift since she began her leave of absence on December 1st. Generate the **Leave Hours Detail** report to view this information.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the Related Items pane, click the arrow to expand the pane, and select Reports Manager.</td><td>
</td></tr>
<tr><td>2</td><td>Expand the Leave category. Then select the Leave Hours Detail report.</td><td>
</td></tr>
</table>

Steps		
3	From the People drop-down list, select the group of employees whose leave hours you want to view. From the Time Period drop-down list, select the time period, or select Range of Dates and enter a 30-day time span using today's date for the start date.	
4	Click **Run Report**.	
5	You are redirected to the **Check Report Status** tab. Review information in the **Status** column. Click **Refresh Status**. Wait until **Complete** displays in the **Status** column.	 
6	To view the report, click the report name and select **View Report**. (Sample leave reports display in the following section.)	
7	(Optional) To print the report, click the print icon on the floating menu bar.	

NOTES: